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Skills and Knowledge Objectives for Section 1: System Access

System Access

- Login
- Change password

GUIDED PRACTICE 1.0
LOGIN

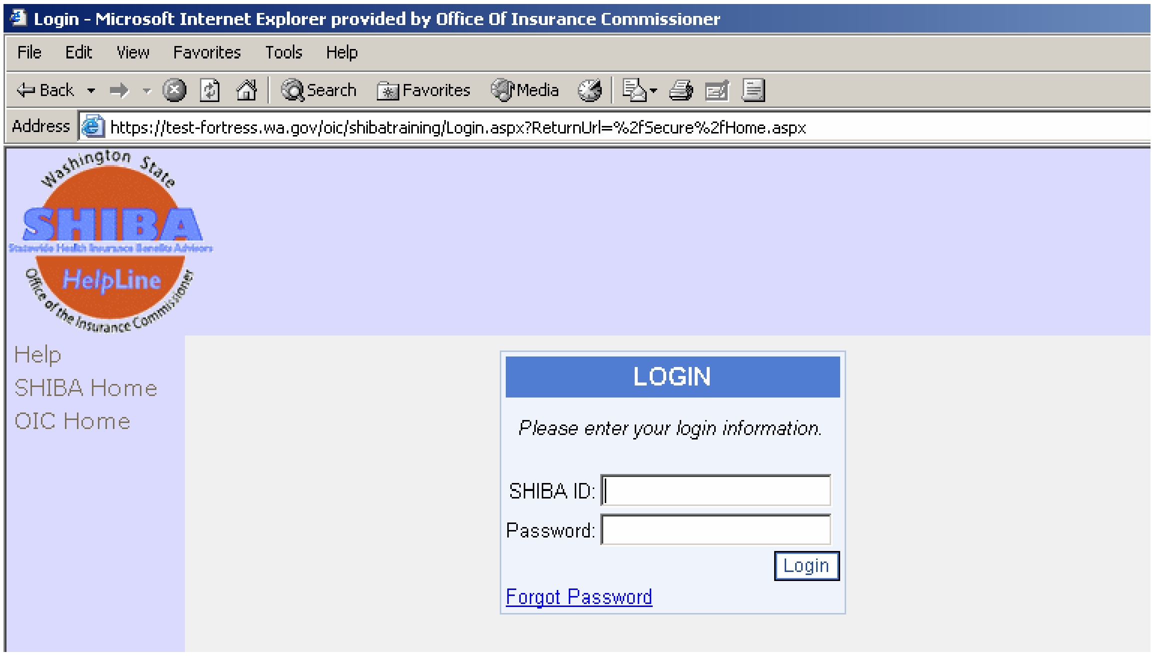
- Click on Internet Explorer
- Type in the address for the database

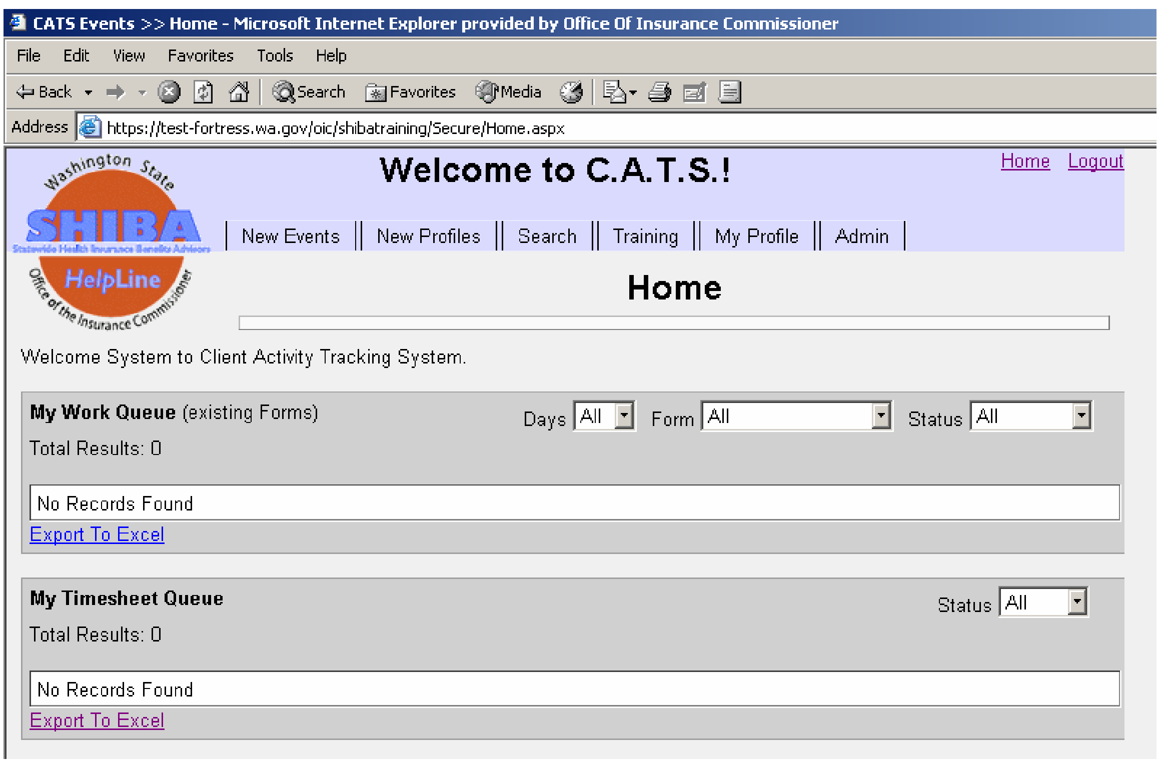
  https://fortress.wa.gov/oic/cats

The login screen appears. [next page]

- type in the SHIBA ID
- type in the password
- click on <Login>

The system Home Page appears. [next page]


Login - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://test-fortress.wa.gov/oic/shibatraining/Login.aspx?ReturnUrl=%2fSecure%2fHome.aspx
Washington State SHIBA HelpLine Office of the Insurance Commissioner
Help
SHIBA Home
OIC Home
LOGIN
Please enter your login information.
SHIBA ID:
Password:
Login
Forgot Password


CATS Events >> Home - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://test-fortress.wa.gov/oic/shibatraining/Secure/Home.aspx
Welcome to C.A.T.S.!
Home Logout
New Events | New Profiles | Search | Training | My Profile | Admin
Home
Welcome System to Client Activity Tracking System.
My Work Queue (existing Forms)
Days All Form All Status All
Total Results: 0
No Records Found
Export To Excel
My Timesheet Queue
Status All
Total Results: 0
No Records Found
Export To Excel

GUIDED PRACTICE 1.1
Forgot password

- Click on Internet Explorer
- Type in the address for the database

https://fortress.wa.gov/oic/cats

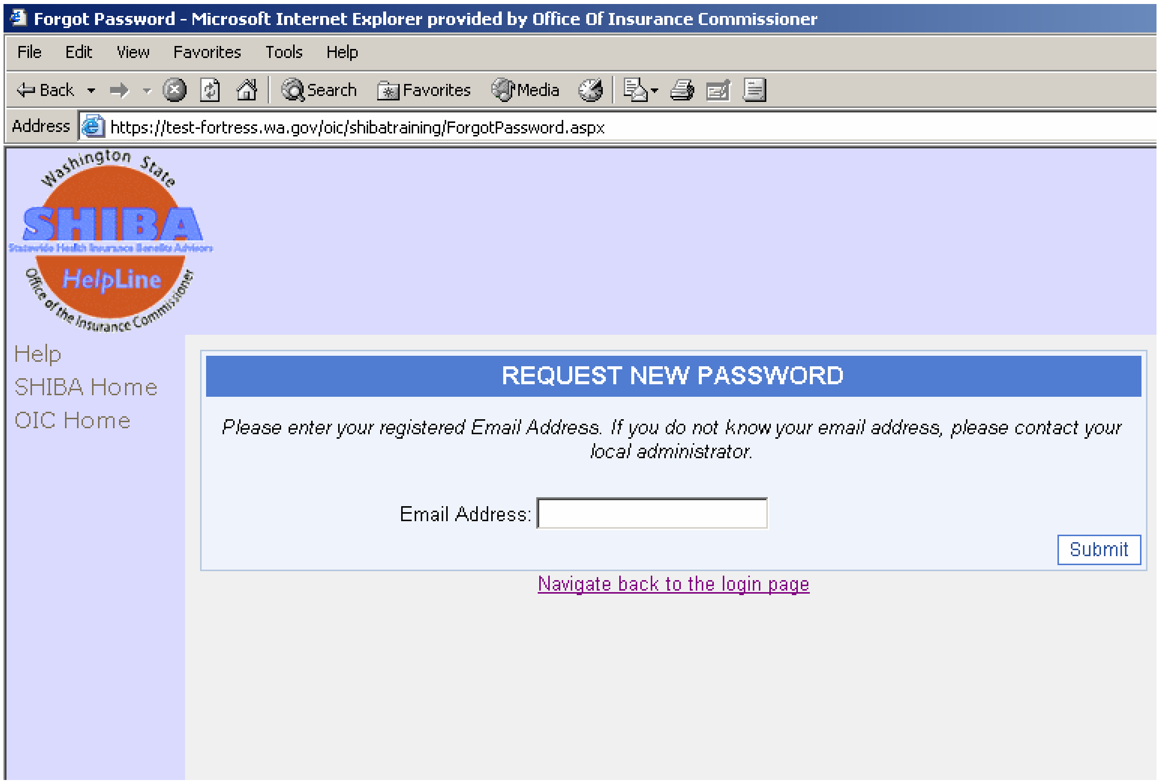
The login screen appears.

- Click on the Forgot Password hyperlink

The Request New Password page appears. [next page]

- Type in the e-mail address you used for this account

The system will send a new, temporary password to you via e-mail.


Forgot Password - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://test-fortress.wa.gov/oic/shibatraining/ForgotPassword.aspx
Washington State
SHIBA
HelpLine
Office of the Insurance Commissioner
Help
SHIBA Home
OIC Home
REQUEST NEW PASSWORD
Please enter your registered Email Address. If you do not know your email address, please contact your local administrator.
Email Address:
Submit
Navigate back to the login page

GUIDED PRACTICE 1.2
Change Password

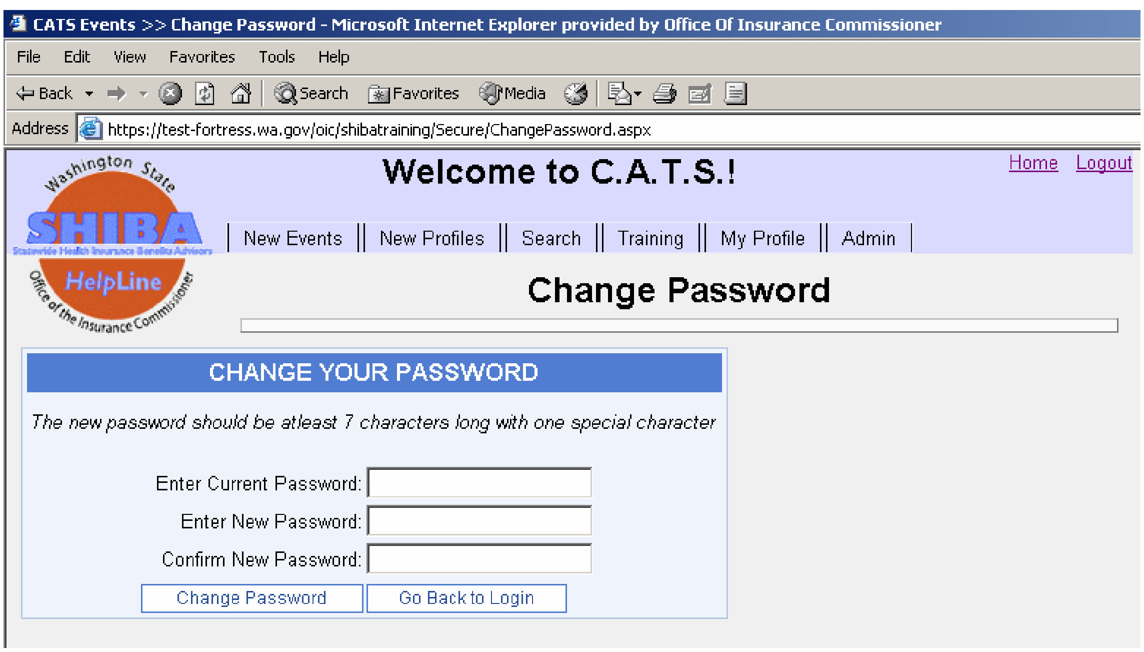
- Login

From the Home page…

- Point at the tab "My Profile"
- Click on Change Password

The change your password screen appears. [see below]

- Type in the current (temporary) password.
- Type in the new password – two times
- Click <Change Password>



INDEPENDENT PRACTICE 1.0
Login

From the desktop, start your browser.

Navigate to the URL for the training database.

Log in with the training user ID and password.

Skills and Knowledge Objectives for Section 2: Home Page

Home Page

- Demonstrate moving back and forth between the screens and the home page
- Identify which activities - drop-down list - relate to each tab
- Identify which tabs relate to which levels of security

PARTICIPANT NOTES – HOME PAGE

Tabs with drop-down menu options

Note: the tabs and drop-down lists depend upon the security level of the user.

New Events

- Client Contact Event
- Public + Media Event
- Timesheet

New Profiles

- Resource
- Organization

Search

- Client Contact Events
- Public & Media Activity Events
- Training Events
- Timesheets
- Resources
- Organizations

Training

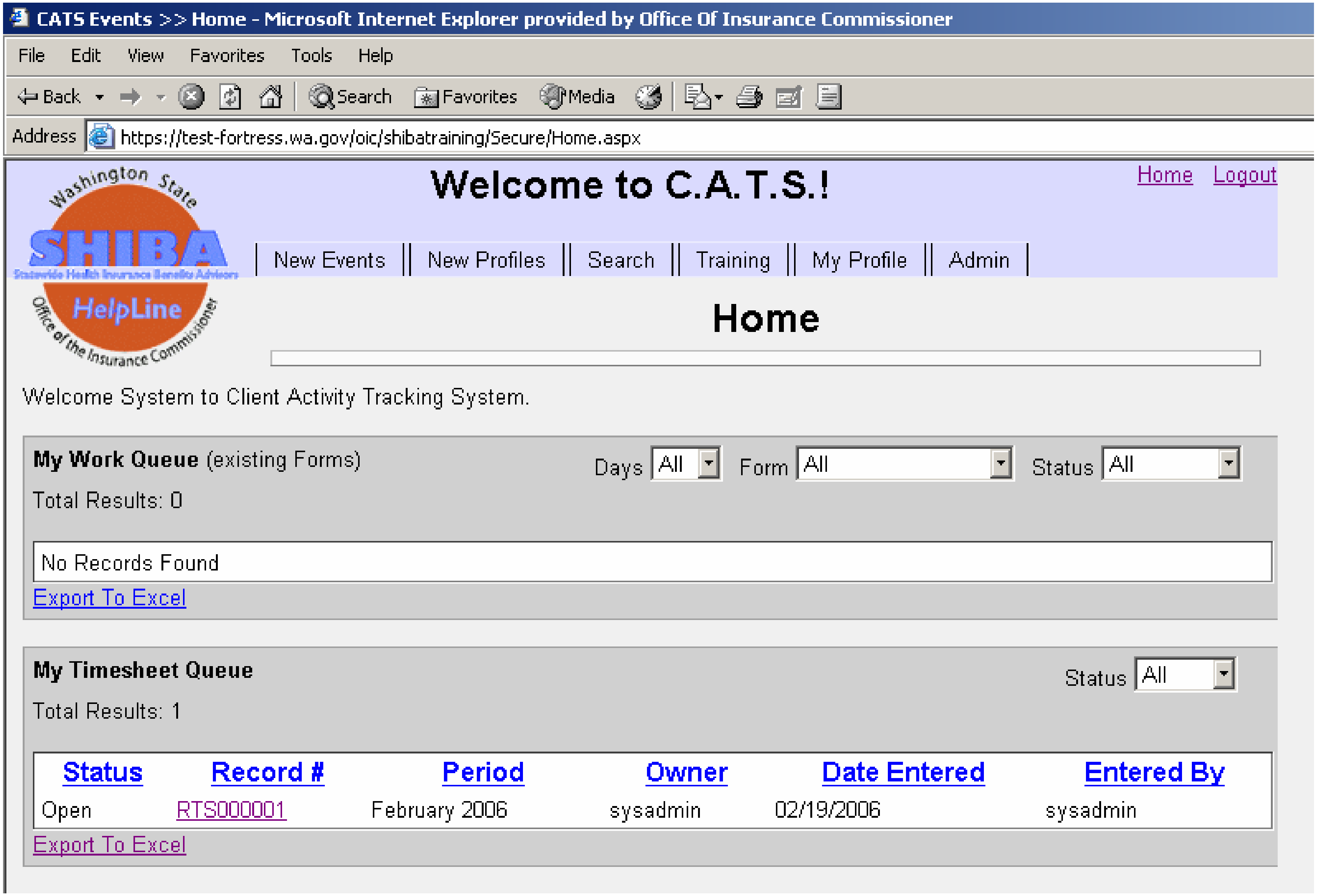
- Schedule A Course

My Profile

- Change Password

Admin

- Unlock Accounts


CATS Events >> Home - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://test-fortress.wa.gov/oic/shibatraining/Secure/Home.aspx
Washington State SHIBA Statewide Health Insurance Benefits Advisors HelpLine Office of the Insurance Commissioner
Welcome to C.A.T.S.!
Home Logout
New Events
New Profiles
Search
Training
My Profile
Admin
Home
Welcome System to Client Activity Tracking System.
My Work Queue (existing Forms)
Days All
Form All
Status All
Total Results: 0
No Records Found
Export To Excel
My Timesheet Queue
Status All
Total Results: 1
Status Record # Period Owner Date Entered Entered By
Open RTS000001 February 2006 sysadmin 02/19/2006 sysadmin
Export To Excel

Security

Security	Forms	Activities
System Administrator -- Total access to all system functionality	Client Contact Report form Public & Media Activity form SHIBA Organization form SHIBA Resource form Volunteer Activity Timesheet form SHIBA Training Sign-in Sheet form	Total access to all system functionality
Super User – Manage Events, People, and Organizations	Client Contact Report form Public & Media Activity form SHIBA Organization form SHIBA Resource form Volunteer Activity Timesheet form SHIBA Training Sign-in Sheet form	Create these (all orgs) Create these (all orgs) Create these (all orgs) Create these (all orgs) Create these (all orgs) Create these (all orgs)
Advanced -- Manage Events and People	Client Contact Report form Public & Media Activity form SHIBA Organization form SHIBA Resource form Volunteer Activity Timesheet form SHIBA Training Sign-in Sheet form	Create these (your org) Create these (your org) Edit these (your org) Create these (your org) Create these (your org) Create these (your org)
Basic -- Manage Events	Client Contact Report form Public & Media Activity form SHIBA Organization form SHIBA Resource form Volunteer Activity Timesheet form SHIBA Training Sign-in Sheet form	Create these (yours) Create these (yours) No access No access Create these (yours) View these
Guest -- View Events	Client Contact Report form Public & Media Activity form SHIBA Organization form SHIBA Resource form Volunteer Activity Timesheet form SHIBA Training Sign-in Sheet form	View these (your org) View these (your org) No access No access View these (your org) View these (your org)

INDEPENDENT PRACTICE 2.0
Home Page

□ From the Home Page…

□ Point at the tab New Events

- Click on Timesheet in the drop down menu.

□ Return to the Home Page, by clicking the hyperlink for Home

□ Repeat this sequence with other tabs.

Skills and Knowledge Objectives for Section 3: Queue's

Queue's

- Identify the forms that are represented in each queue
- Identify the properties of each record that are displayed in the queue
- Understand the difference between the 'owner' of a record compared to the person who entered the record
- Distinguish the type of activity recorded in the system by review of the 'type' field
- Demonstrate using the hyperlink to sort records in the queue
- Demonstrate using the drop-down lists to filter the records in each queue
- Demonstrate exporting the records in the queue to an Excel spreadsheet

PARTICIPANT NOTES
Queues

My Work Queue

Displays events recorded on certain forms:
- Client Contact Report (CCR)
- Public and Media Activity (PMA)
- Schedule a course

My Timesheet Queue

Displays events recorded on certain forms:
- Timesheet

You can see that in each queue and for each type of form certain details are recorded about the events – these are the column headers and you can sort by these. [Click on the column header to see that it's a hyperlink.]

You can also control which forms or events you see in each queue.

To do that, use the drop-down arrows to select by:
- certain kinds of forms
- certain event dates
- the status of the event

If there were too many results to fit in this view, you'd see a tag like this:

<u>1</u> 2 3

This means that you are looking at page 1 out of 3 pages of results. The first several results will appear in the window and other results will appear on other pages. This is familiar for those of you that work with Internet search engines like Google.

PARTICIPANT NOTES
My Work Queue

STATUS

With regard to the CCR:
Complete means that the record can and will be sent to CMS as part of our Quarterly report. It also means that the Sponsor agency gets credit for it as part of their performance measures.
Incomplete means the opposite. The record will not be sent to CMS as part of our Quarterly report. It also means that the Sponsor agency does not get credit for it as part of their performance measures.

With regard to the PMA and Scheduled Courses:
Complete means that the event has already occurred and that the form in the database was completed – including attendance figures.
Incomplete means that the event either (1) has been scheduled in advance and has not yet occurred or (2) that the event has already occurred but that the form in the database has not been completed – including attendance figures.

As with CCR forms, incomplete PMA records will not be sent to CMS and the Sponsor will not get credit for these.

RECORD #

This is the record ID that the database assigned to each form that was entered.

FORM

This is CCR, PMA or Scheduled Course.

TYPE

Refers to the kind of event that was recorded. **Sample** values include:

- CCR – type of contact
    - Quick call
    - Telephone
    - In person (site)
- PMA – type of activity
- Scheduled Course – name of course

<u>DATE</u>
This date is assigned by the computer. (When was the event (timesheet) recorded (data entry was completed – the record was saved).

<u>OWNER</u>
Is the name / user ID of the person whose work we are counting. Typically, this is the volunteer, but it could also be a Sponsor staff person or an OIC staff person or a community partner.
The name / User ID of the person who will deliver a presentation or training course – it may or may not be the same as the person who created the record in the system.

<u>DATE ENTERED</u>
The date that the record was initiated in the database. (It may have been modified later.)

<u>ENTERED BY</u>
The name / user ID of the person who entered the record into the database. It may be the resource (e.g. volunteer) themselves or it could be that someone else put the record (CCR, PMA, Course) into the database.

<u>EXPORT TO EXCEL</u>

This is a very simple report for you to create so that you can do some basic calculations and other kinds of simple sorting.

When you click on export to excel, the computer will create an Excel spreadsheet that you can save or open.

PARTICIPANT NOTES
Timesheet Queue

STATUS
The status of a timesheet is 'open or 'closed'

- Open means that you can make edits in the record
- Closed means you cannot edit the record

A timesheet is closed when the month in which time was recorded is more than 2 months after the close of the quarter.

RECORD #
This is the record ID that the database assigned to each form that was entered.

PERIOD
A period is always one calendar month. It is the month in which time is recorded / work was performed.

OWNER
Is the name / user ID of the person whose work we are counting. Typically, this is the volunteer, but it could also be a Sponsor staff person or an OIC staff person or a community partner.

DATE ENTERED
This date is assigned by the computer. (When was the event (timesheet) recorded (data entry was completed – the record was saved).

ENTERED BY
The name / user ID of the person who entered the record into the database. It may be the resource (e.g. volunteer) themselves or it could be that someone else put the record (timesheet) into the database.

EXPORT TO EXCEL

This is a very simple report for you to create so that you can do some basic calculations and other kinds of simple sorting

When you click on export to Excel, the computer will create an Excel spreadsheet that you can save or open.

INDEPENDENT PRACTICE 3.0
Queue’s

□ Use the hyperlink to sort records in the queue

□ Use the drop down lists to filter the records in each queue

□ Export the records in the queue to an Excel spreadsheet

Skills and Knowledge Objectives for Section 4: Timesheet

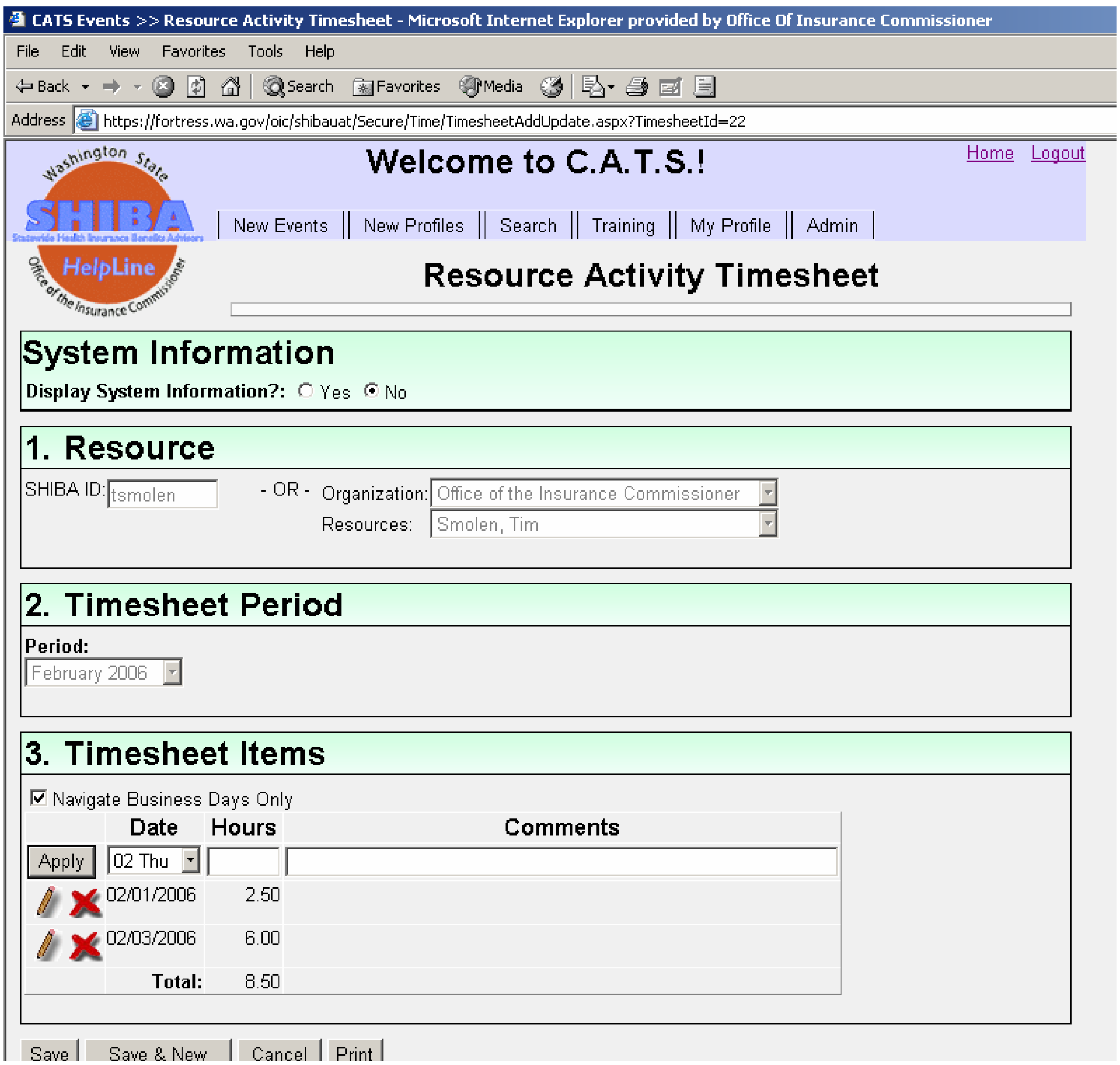
Timesheet

- Open an existing timesheet, from the queue
- Understand that there can only be one timesheet per period (for each resource)
- Add time to an existing timesheet using <Apply>
- Edit (add, modify, delete time values from) a timesheet
- Describe the difference between open and closed period for timesheets
- Demonstrate use of the "Display System Information" radio buttons
- Print a timesheet (PDF)
- Record a new timesheet
- Save a timesheet record

GUIDED PRACTICE 4.0
Open a Timesheet

- From the user Home Page…
- From the My Timesheet Queue…
- Click on the hyperlink for the record #

- The Resource Activity Timesheet screen appears



GUIDED PRACTICE 4.1 – 4.4

4.1/2 Add/edit timesheet
4.3 Delete time
4.4 Print a timesheet

Add time to a timesheet

- From the user Home Page…
- Point at the New Events tab
- Click on Timesheet in the drop-down menu

Section 1 – Resource

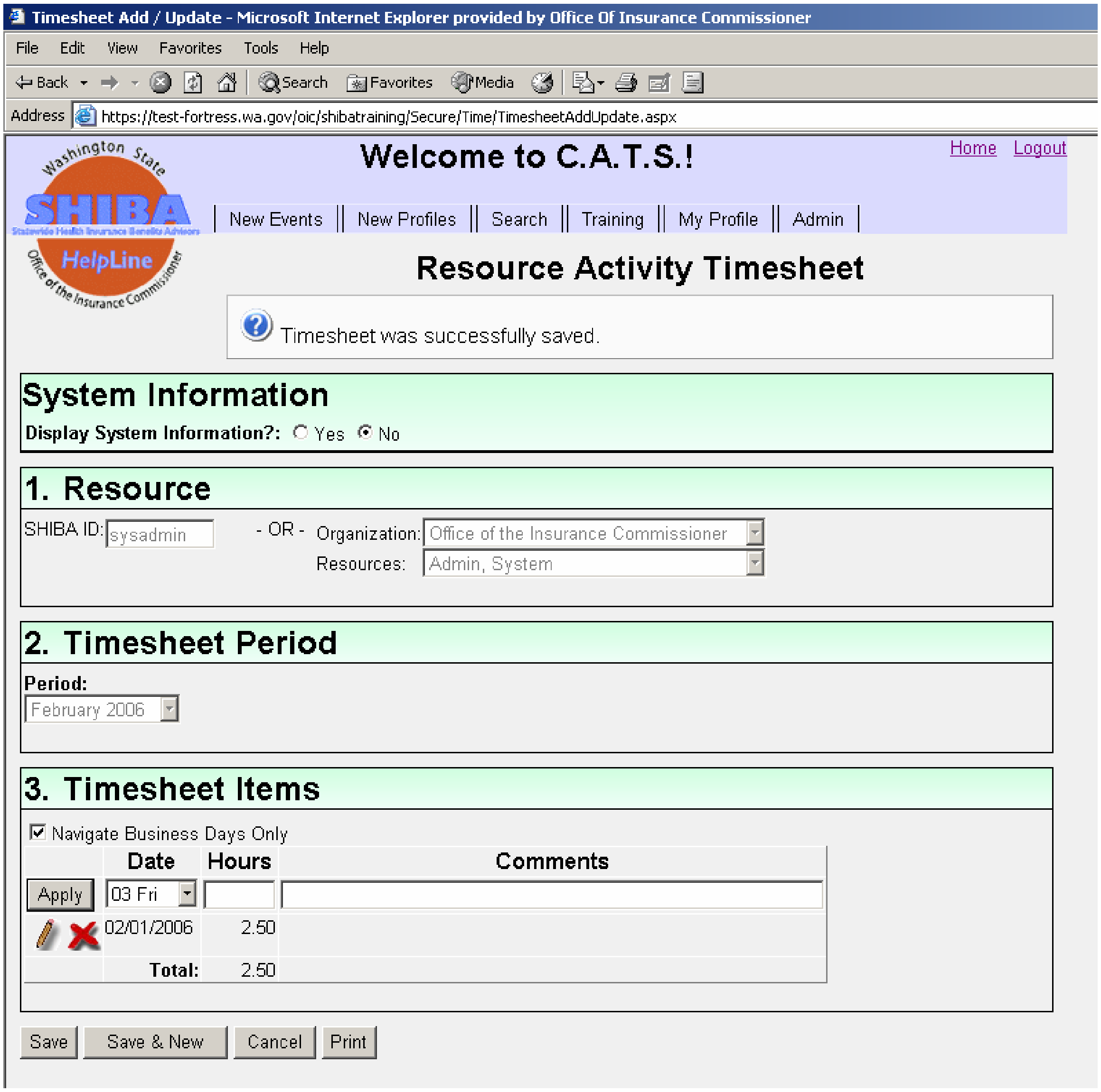
- Enter your SHIBA ID or choose your organization and resource from the filtered drop-down lists

Section 2 – Timesheet Period

- Select a period (month) from the drop-down list.

Section 3 – Timesheet Items

- This only appears after you select a period in Section 2.
- Select a date from the drop-down list.
- Enter the number of hours in the field 'Hours.'
- Optional: Add a comment.
- Click <Apply>
- Scroll down and hit <Save>


Timesheet Add / Update - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://test-fortress.wa.gov/oic/shibatraining/Secure/Time/TimesheetAddUpdate.aspx
Washington State
SHIBA
HelpLine
Office of the Insurance Commissioner
Welcome to C.A.T.S.!
Home Logout
New Events | New Profiles | Search | Training | My Profile | Admin
Resource Activity Timesheet
Timesheet was successfully saved.
System Information
Display System Information?: Yes No
1. Resource
SHIBA ID: sysadmin - OR - Organization: Office of the Insurance Commissioner
Resources: Admin, System
2. Timesheet Period
Period:
February 2006
3. Timesheet Items
Navigate Business Days Only
Date Hours Comments
Apply 03 Fri
02/01/2006 2.50
Total: 2.50
Save Save & New Cancel Print

Edit an event record

- Click on the icon that looks like a pencil – next to the date and time that need to be revised.

  That value is now active.

- Type in the correct time value (or use the drop-down list to change the date).
- Click <Apply>
- Scroll down and hit <Save>

Delete an event record

- Click on the icon that looks like a red 'X' – next to the date and time that need to be removed.

  A warning message appears.

- Click <OK> to delete the event record.
- Click <Apply>
- Scroll down and hit <Save>

Print

- Click on <Print> to create a PDF version of the timesheet that you can save or open (to print).

GUIDED PRACTICE 4.1
Record a Timesheet

- From the user Home Page…
- Point at the New Events tab
- Click on Timesheet in the drop-down menu

<u>Section 1 – Resource</u>

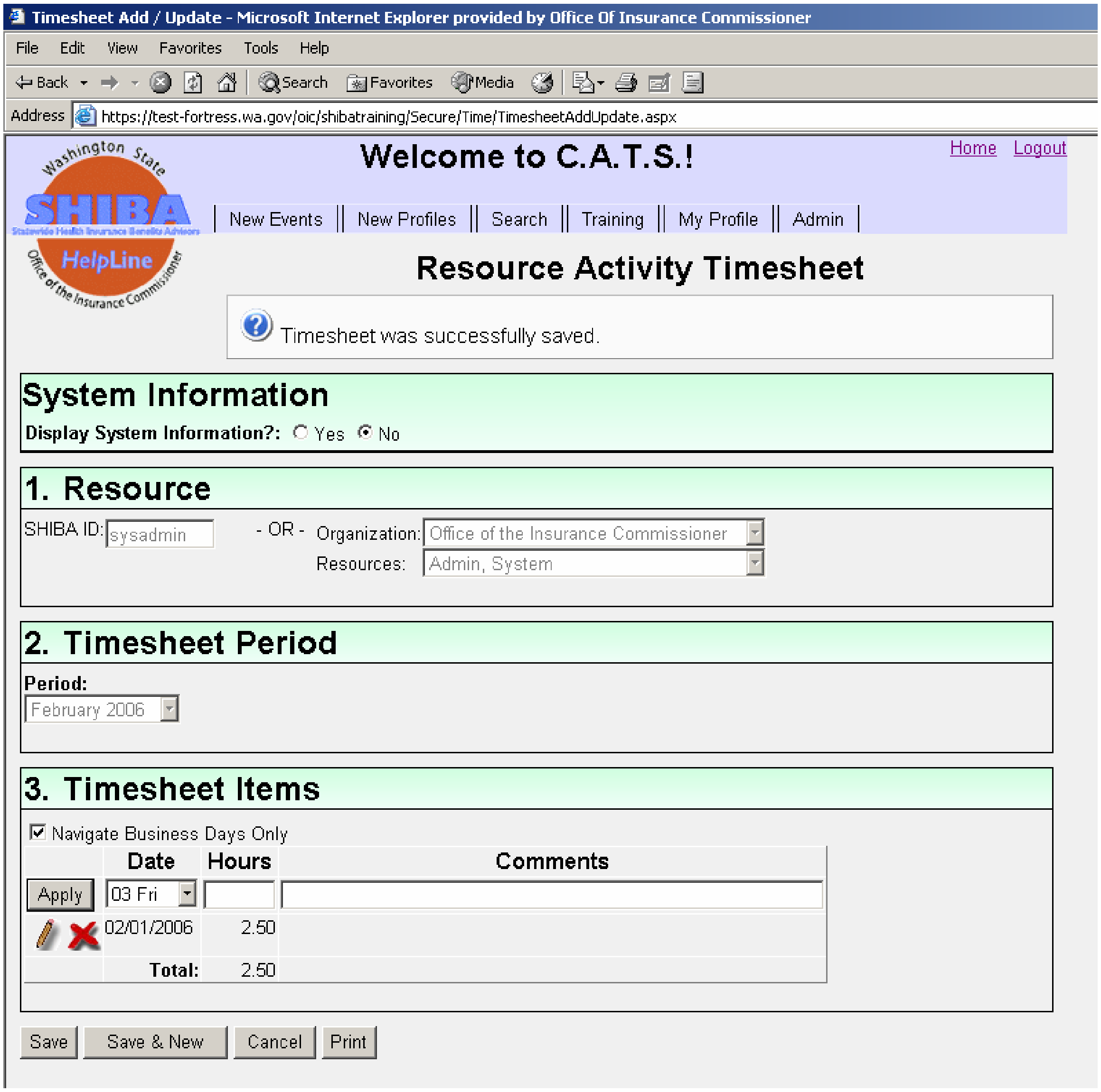
- Enter your SHIBA ID or choose your organization and resource from the filtered drop-down lists

<u>Section 2 – Timesheet Period</u>

- Select a period (month) from the drop-down list.

<u>Section 3 – Timesheet Items</u>

- This only appears after you select a period in Section 2.
- Select a date from the drop-down list.
- Enter the number of hours in the field 'Hours.'
- Optional: Add a comment.
- Click <Apply>
- Scroll down and hit <Save>


Timesheet Add / Update - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://test-fortress.wa.gov/oic/shibatraining/Secure/Time/TimesheetAddUpdate.aspx
Washington State SHIBA HelpLine Office of the Insurance Commissioner
Welcome to C.A.T.S.!
Home Logout
New Events | New Profiles | Search | Training | My Profile | Admin
Resource Activity Timesheet
Timesheet was successfully saved.
System Information
Display System Information?: Yes No
1. Resource
SHIBA ID: sysadmin - OR - Organization: Office of the Insurance Commissioner
Resources: Admin, System
2. Timesheet Period
Period:
February 2006
3. Timesheet Items
Navigate Business Days Only
Date Hours Comments
Apply 03 Fri
02/01/2006 2.50
Total: 2.50
Save Save & New Cancel Print

INDEPENDENT PRACTICE 4.0
Record a Timesheet

Using the **sample** timesheet in your participant manual, record a timesheet.

□ Practice with edit

□ Practice with add notes

□ Practice with delete

□ Check your work in the Timesheet Queue on the user Home Page.

Skills and Knowledge Objectives for Section 5: Client Contact Report

Client Contact Report

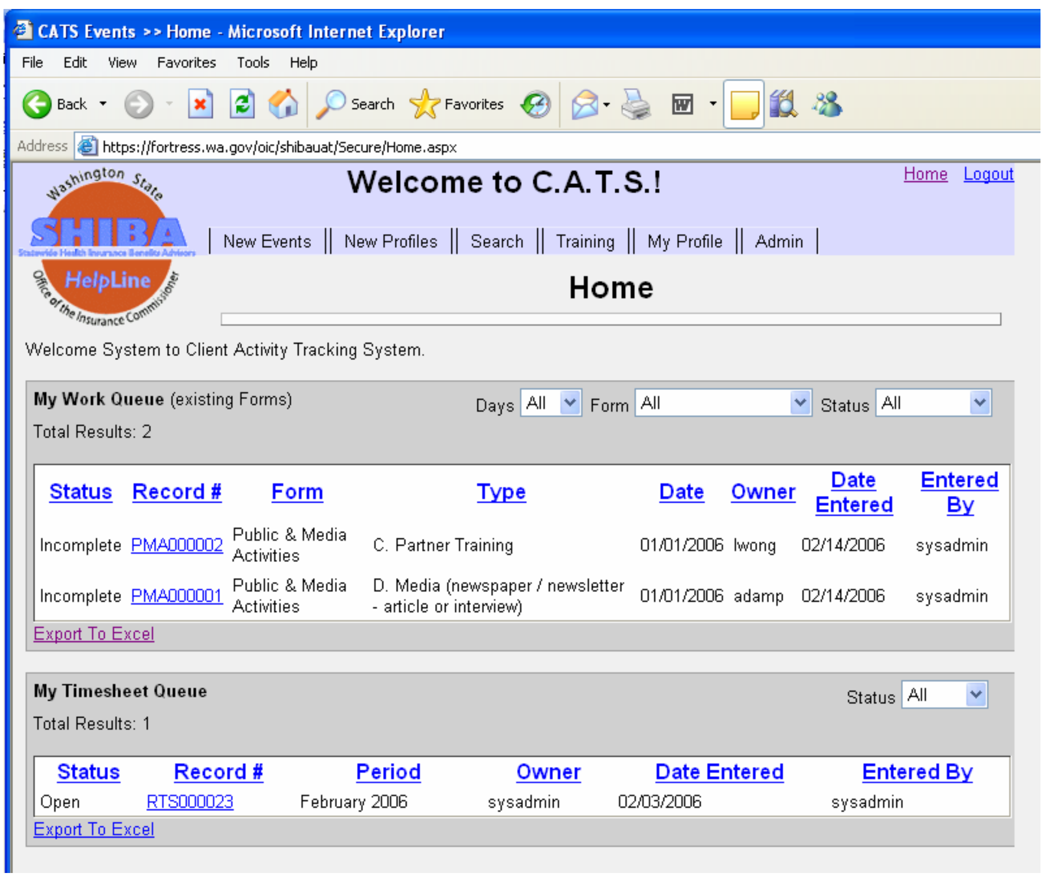
- Open an existing CCR, from the queue
- Complete an incomplete CCR record
- Identify the fields that must be completed to save a record
- Identify the fields that must be completed to code a record "complete"
- Describe the difference between complete and incomplete for CCR records
- Demonstrate use of the Notes fields to add, edit, delete, save notes.
- Record a new CCR
- Identify specified field validation rules

GUIDED PRACTICE 5.0
Open a CCR, from My Work Queue

From the user Home Page…
From My Work Queue (existing forms)…

- Click on the record ID # CCR0000**zz** to open that CCR

Click Home, to return to the Home Page.



PARTICIPANT NOTES
CLIENT CONTACT EVENT SCREENS

Fields <u>required</u> to **save** an event record.

- counseling site zip code
- date of initial contact
- type of contact
- gender
- topic(s) discussed
- time spent
- assistance requested by
- how did you hear about the SHIBA HelpLine

Fields <u>required</u> to code a record as '**complete.'**

- client county
- client zip code
- age range *or* decline to disclose
- disabled status *or* decline to disclose
- ethnicity *or* decline to disclose

Of course, we'd like all the fields to be completed by the volunteers, but these are <u>essential</u>.

GUIDED PRACTICE 5.1
Complete an incomplete CCR

From the user Home Page…
From My Work Queue (existing forms)…

Note: the Status for record ID # CCR0000**zz** is "Incomplete"

- Click on the record ID # CCR0000**zz** to open that CCR
- Click <Save>
- Read the error messages at the top of the screen
- Complete the required fields – using the information provided below
- Click <Save>

Click Home, to return to the Home Page.

Note: the Status for the record ID # CCR0000**zz** is now "Complete"

Use this data to complete the form:

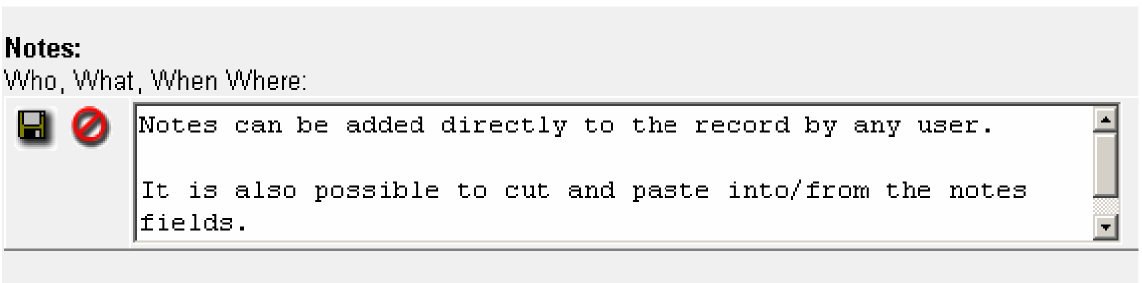
Client Zip Code	99000
Age range	did not disclose
Disabled	did not disclose
Race/Ethnicity	did not disclose

PARTICIPANT NOTES
NOTES FIELDS

Add Notes

- Click on <Add Note> to open the notes field.

You can enter text into this space and edit it here, too.
It is possible to cut and paste into and out of this space.



Save notes

- Click on the icon (look left of the notes field) that looks like a diskette (the square) to save your notes. The system will not allow you to <Save> the record without first clicking the diskette icon, saving your Notes.

Edit notes

- Click on the icon that looks like a pencil.

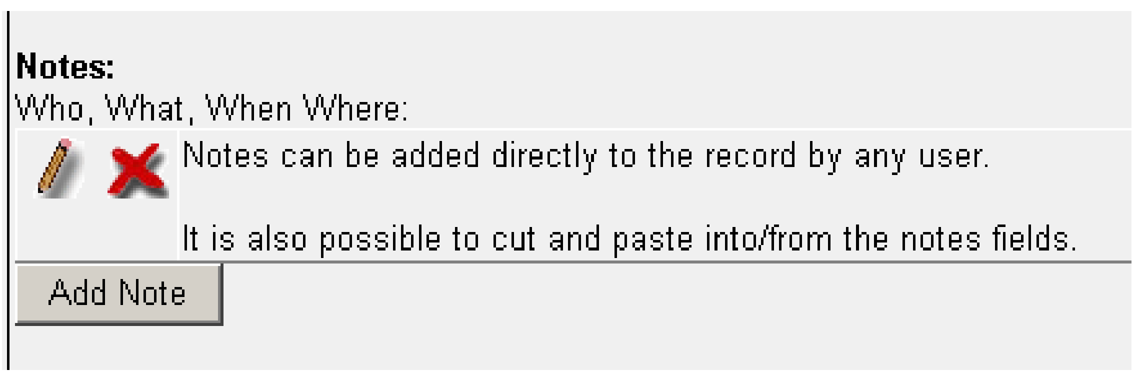
This will open the case notes field.

Delete notes

- Highlight the text you would like to delete.
- Click on the icon that looks like a red 'X'.

A warning message appears.

- Click <OK> to continue.



FIELD LEVEL VALIDATION RULES

Note: in the case where the field level validation rules are not met – and the field is not required to save the record – the record can/will be saved, but no value will be recorded in the field.

Zip code fields
The correct format is five digits [no alpha, no zip + 4]
Example field: "counseling site zip code"

Date fields
The correct format is mm/dd/yyyy.
Example field: "date of initial contact"

Telephone number fields
The correct format is xxx-xxx-xxxx. Telephone extensions may be included, but must be preceded by a space and an "x", i.e., 360-526-3326 x1234

Radio button fields
This means you choose one and only one value from this list.
Example field:" type of contact"

Time
The correct format is whole numbers. Zero (0) to 59 for minutes, up to 99 hours. *Example field:" time spent"*

Check box fields
This means that you can choose as many of these as you like. They are not mutually exclusive.
Example field: "assistance was requested by"

Family Size
The correct format is whole numbers. Value = Zero (0) to 99.

Monthly Income Before Taxes
The correct format is whole numbers – no decimals, commas or $ signs. Value = Zero (0) to 999999999.

Estimated Assets (For individual or couple)
The correct format is whole numbers – no decimals, no commas or $ signs. Value = Zero (0) to 999999999.

INDEPENDENT PRACTICE 5.2
Record a CCR

(1) Using the sample forms provided in the participant notebook, plus the notes you have, record a CCR.

- Quick call
- Telephone
- Telephone
- In-person (site)

(2) After you complete the data entry, for all four (4) cases, refer back to the Home Page, My Work Queue, to see the results.

<u>Suggestion</u>: Write the record ID# from the system on the paper form.

Q. What possible challenges do you foresee with data entry in your own agency?
Q. How might you address those?

Skills and Knowledge Objectives for Section 6: Search

Search

- Use the Search function to find /open an existing record by the record ID#
- Use the Search function to find existing records that match certain selection criteria
- Understand that records have specified prefixes (useful to search function)
- Apply basic/advanced search criteria to locate various kinds of records

GUIDED PRACTICE 6.0
Using the Search Function

Find / Open a record

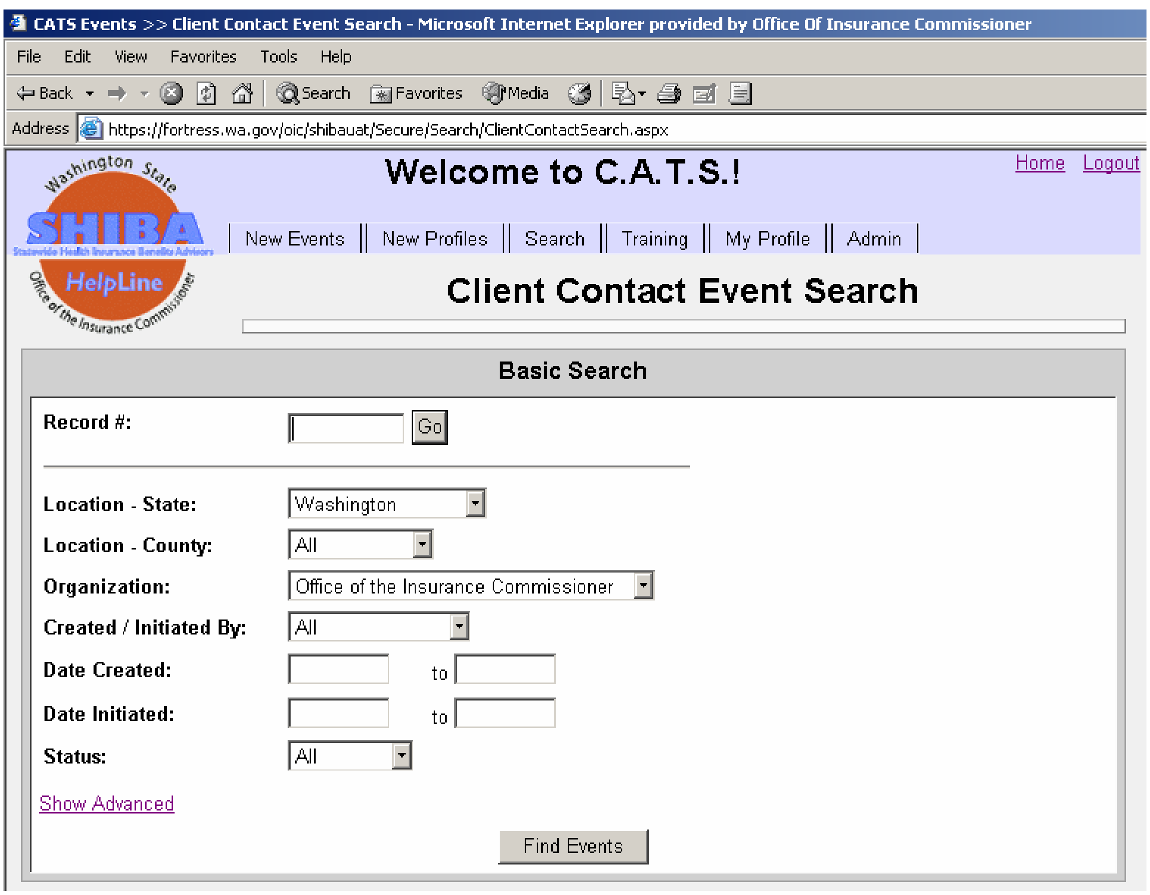
From the user Home Page…

- Point at Search, click on Client Contact Events

The Basic Search window appears [see below]

- Type in Record ID # CCR 0000zz
- Click <Go> or press <Enter> on the keyboard

That record appears in the screen.



Find a record or records that match selection criteria

From the Basic Search window…
For the field Status:

- Click the drop-down list to select Incomplete,
- Click <Find Events>

All records that match the selection criteria appear in the Search Results window [see below].

To open the record of interest, click on the hyperlink for the ID #.

Search Results

Records Found: 4

Complete	ID #	Counselor Name	Date Created	Created By
No	CCR000017	Basic, User	02/09/2006	Basic, User
No	CCR000019	Basic, User	02/09/2006	Basic, User
No	CCR000021	Advanced, User	02/09/2006	Advanced, User
No	CCR000022	Smolen, Tim	02/09/2006	Smolen, Tim

Export To Excel

The search function relates to events (i.e. CCR's, PMA's, Timesheets) as well as people (i.e. resources) and organizations.

More information about the selection criteria is provided in the participant notebook.

PARTICIPANT NOTES
Search

You can search for records in the database. For ease of searching, the event records are coded with a prefix.

Prefix	For records of this kind
CCR	Client Contact Report
PMA	Public and Media
RTS	Timesheet
RES	Resource
ORG	Organization
TRS	Training

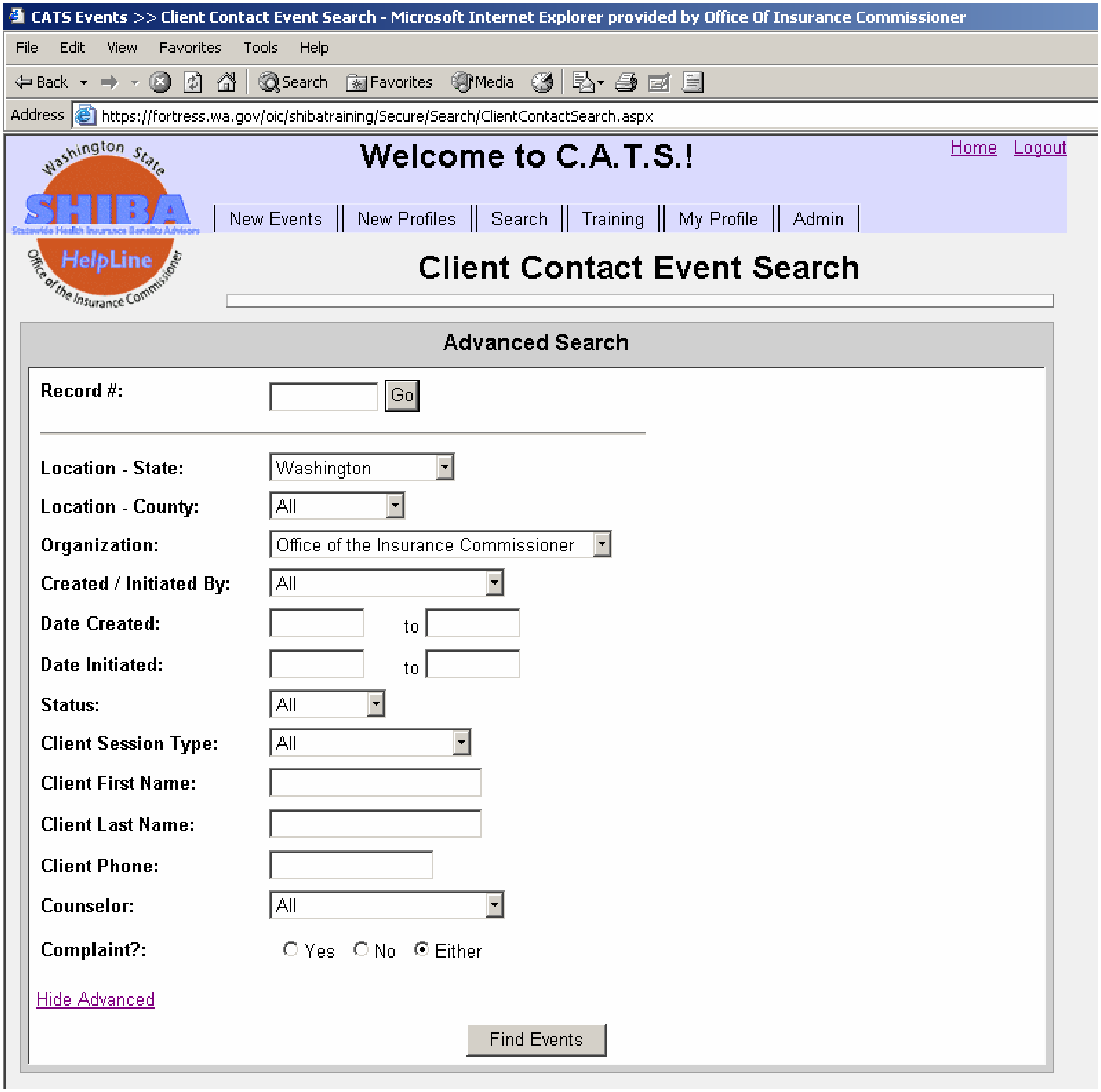
Each search window has an option for an advanced search. Click on Show Advanced to add other search criteria. (Click on Hide Advanced to return to the Basic search criteria.) Advanced search includes more options, fields to choose from - to narrow the search. The results of your search – basic or advanced – will be displayed in a separate Search Results window.

If there were too many results to fit in this view, you'd see a tag like this

1 2 3

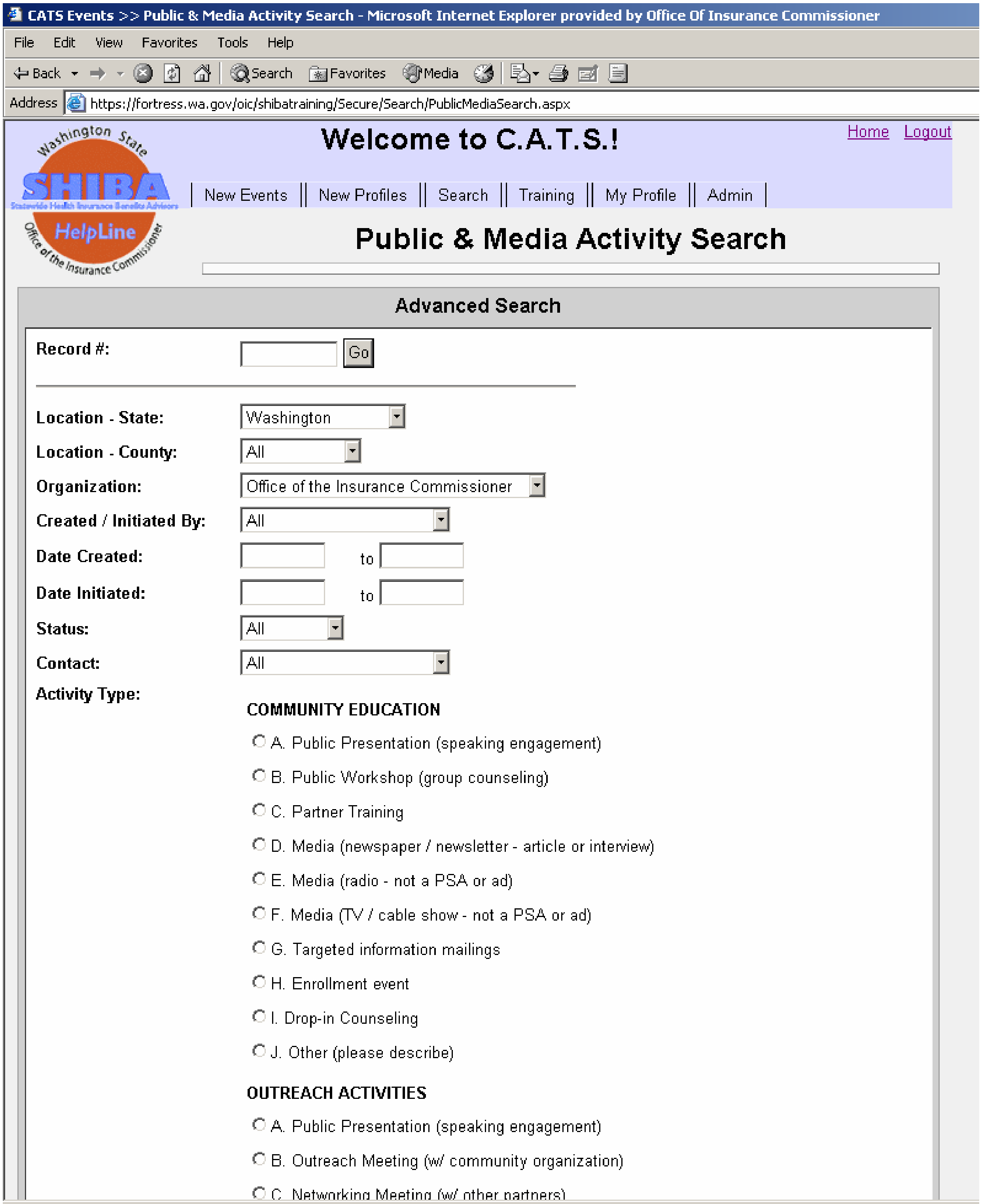
This means that you are looking at page 1 out of 3 pages of results. The first several results will appear in the window and other results will appear on other pages. This is familiar for those of you that work with Internet search engines like Google.

For more details about the search criteria, review pages **zz** in your notebook.


CATS Events >> Client Contact Event Search - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://fortress.wa.gov/oic/shibatraining/Secure/Search/ClientContactSearch.aspx
Washington State SHIBA Statewide Health Insurance Benefits Advisors HelpLine Office of the Insurance Commissioner
Welcome to C.A.T.S.!
Home Logout
New Events | New Profiles | Search | Training | My Profile | Admin
Client Contact Event Search
Advanced Search
Record #: Go
Location - State: Washington
Location - County: All
Organization: Office of the Insurance Commissioner
Created / Initiated By: All
Date Created: to
Date Initiated: to
Status: All
Client Session Type: All
Client First Name:
Client Last Name:
Client Phone:
Counselor: All
Complaint?: Yes No Either
Hide Advanced
Find Events

SEARCH CRITERIA
CCR

Basic	
Record #	The record number, e.g. CCR000001.
Location	The State and/or County based on the Client County field
Organization	Customarily, the name of the Sponsor.
Created/Initiated By	The name of the resource (i.e. volunteer) that **entered** the event record into the system.
Date Created	Use this format: mm/dd/yyyy
Date Initiated	The date of initial contact
Status	All, Complete or Incomplete
Advanced	
Client Session Type	Type of contact = Quick Call, Telephone, In-person (home), E-mail/FAX/postal mail, In-person (site)
Client First Name	Client First Name
Client Last Name	Client Last Name
Client Phone	Use this format: 555-555-5555
Counselor	The name of the resource (i.e. volunteer) attached to the event record in the system.
Complaint	Yes, No, Either (all records)



CATS Events >> Public & Media Activity Search - Microsoft Internet Explorer provided by Office Of Insurance Commissioner

File Edit View Favorites Tools Help

Back Search Favorites Media

Address https://fortress.wa.gov/oic/shibatraining/Secure/Search/PublicMediaSearch.aspx

Washington State SHIBA Statewide Health Insurance Benefits Advisors HelpLine Office of the Insurance Commissioner

Home Logout

Welcome to C.A.T.S.!

| New Events || New Profiles || Search || Training || My Profile || Admin |

Public & Media Activity Search

Advanced Search

Record #: [ ] Go

Location - State: Washington

Location - County: All

Organization: Office of the Insurance Commissioner

Created / Initiated By: All

Date Created: [ ] to [ ]

Date Initiated: [ ] to [ ]

Status: All

Contact: All

Activity Type:

COMMUNITY EDUCATION

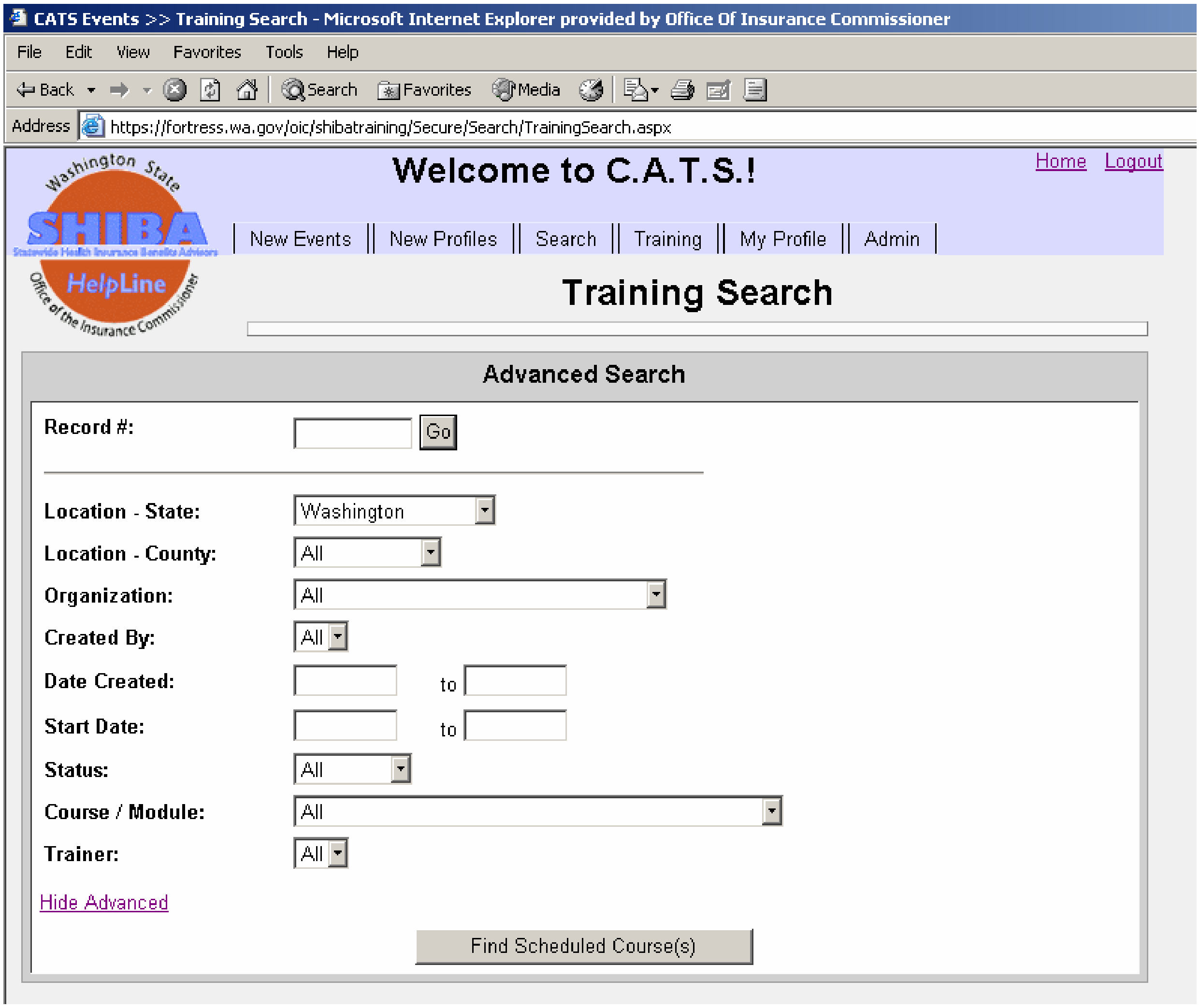
- A. Public Presentation (speaking engagement)
- B. Public Workshop (group counseling)
- C. Partner Training
- D. Media (newspaper / newsletter - article or interview)
- E. Media (radio - not a PSA or ad)
- F. Media (TV / cable show - not a PSA or ad)
- G. Targeted information mailings
- H. Enrollment event
- I. Drop-in Counseling
- J. Other (please describe)

OUTREACH ACTIVITIES

- A. Public Presentation (speaking engagement)
- B. Outreach Meeting (w/ community organization)
- C. Networking Meeting (w/ other partners)

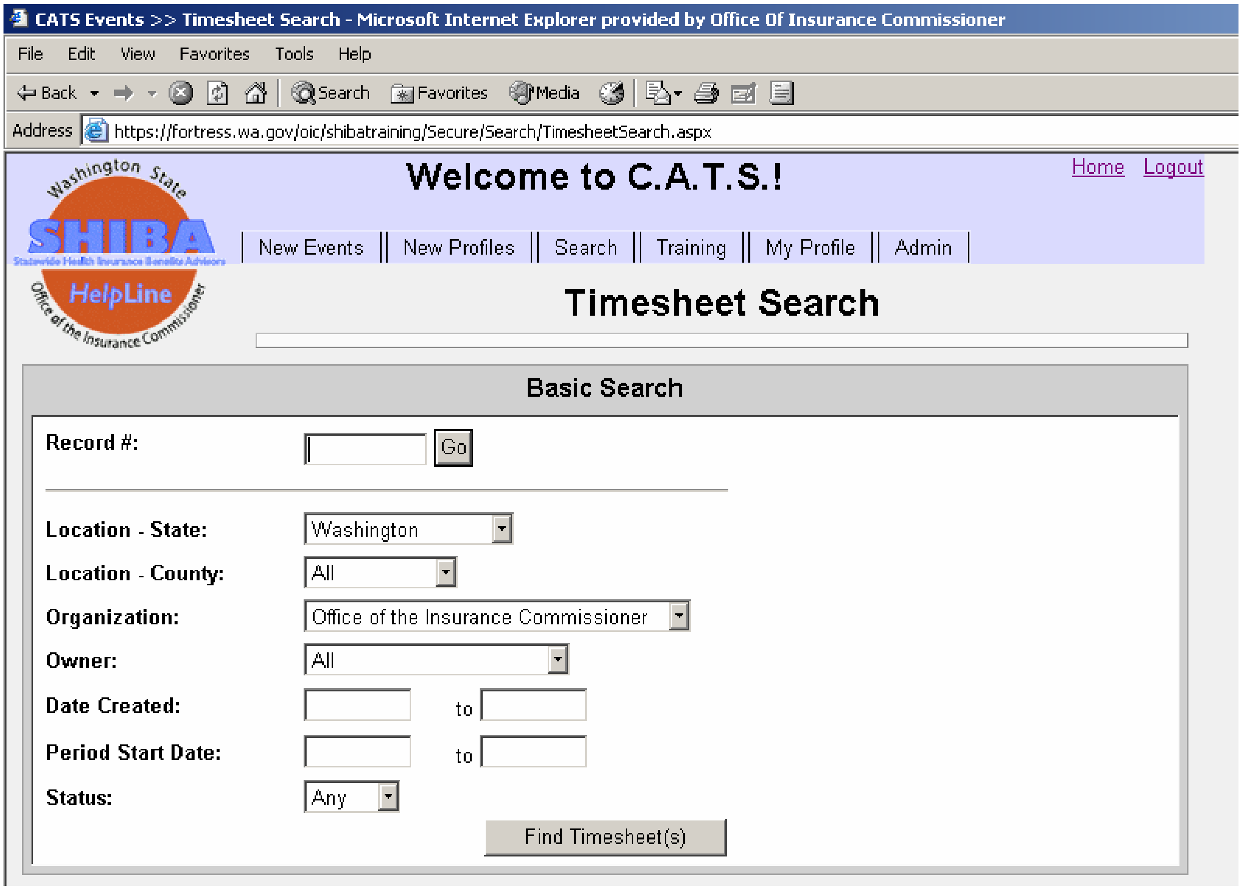
SEARCH CRITERIA – PMA

Basic	
Record #	The record number, e.g. PMA000001.
Location	The State and/or County based on the Assigned County field
Organization	Customarily, the name of the Sponsor.
Created/Initiated By	The name of the resource (i.e. volunteer) that **entered** the event record into the system.
Date Created	Use this format: mm/dd/yyyy
Date Initiated	The date of initial contact
Status	Complete, Incomplete, All
Advanced	
Contact	The name of the resource (i.e. volunteer) that is **assigned** the event record in the system.
Activity Type	Community Education (listed by type of activity – check one) OR Outreach Activities (listed by type of activity – check one)


CATS Events >> Training Search - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://fortress.wa.gov/oic/shibatraining/Secure/Search/TrainingSearch.aspx
Washington State SHIBA Statewide Health Insurance Benefits Advisors HelpLine Office of the Insurance Commissioner
Welcome to C.A.T.S.!
Home Logout
New Events | New Profiles | Search | Training | My Profile | Admin
Training Search
Advanced Search
Record #: Go
Location - State: Washington
Location - County: All
Organization: All
Created By: All
Date Created: to
Start Date: to
Status: All
Course / Module: All
Trainer: All
Hide Advanced
Find Scheduled Course(s)

SEARCH CRITERIA
Training

Basic	
Record #	The record number, e.g. TRS000203.
Location	The State and/or County based on the training location.
Organization	The name of the Organization to which the Trainer is assigned.
Created By	The SHIBA ID for the person who created the record in the system.
Date Created	The date the record was entered into the system. Use this format: mm/dd/yyyy
Start Date	The first date of the training event.
Status	All, Open, Cancelled, Closed
Advanced	
Course / Module	A drop-down list of the names of the courses.
Trainer	A drop-down list of resources' names.

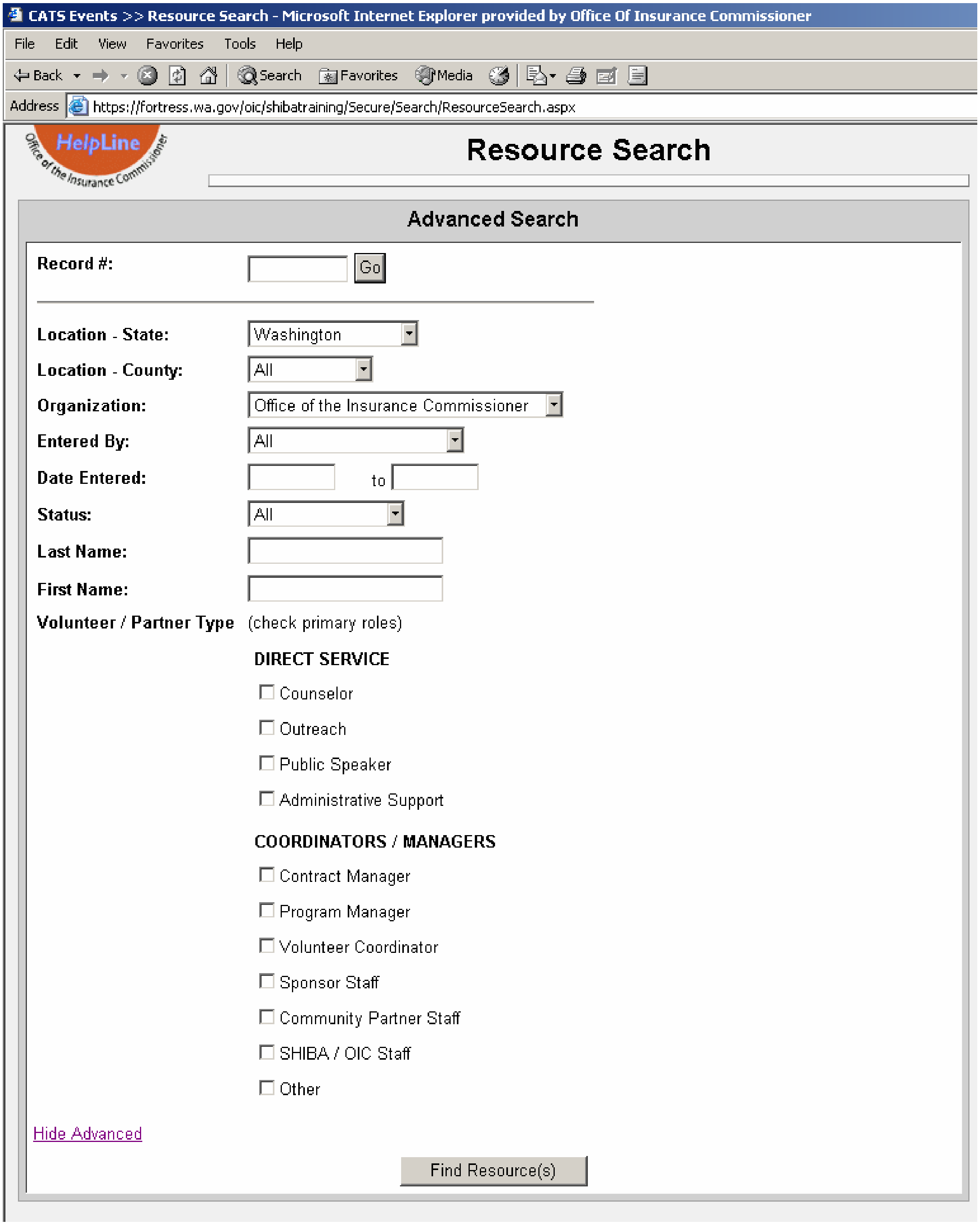


CATS Events >> Timesheet Search - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://fortress.wa.gov/oic/shibatraining/Secure/Search/TimesheetSearch.aspx
Washington State SHIBA Statewide Health Insurance Benefits Advisors HelpLine Office of the Insurance Commissioner
Welcome to C.A.T.S.!
Home Logout
New Events | New Profiles | Search | Training | My Profile | Admin
Timesheet Search
Basic Search
Record #: Go
Location - State: Washington
Location - County: All
Organization: Office of the Insurance Commissioner
Owner: All
Date Created: to
Period Start Date: to
Status: Any
Find Timesheet(s)

SEARCH CRITERIA
Timesheet

Basic	
Record #	The record number, e.g. RTS000006.
Location	The State and/or County based on the Assigned County field
Organization	Customarily, the name of the Sponsor.
Owner	The name of the resource (i.e. volunteer) that worked on behalf of the SHIBA HelpLine program.
Date Created	Use this format: mm/dd/yyyy
Period Start Date	The first date of the month (period)
Status	Open, Closed, Any

Note: you can use either a starting or ending date for date range searches – you need not use both.



CATS Events >> Resource Search - Microsoft Internet Explorer provided by Office Of Insurance Commissioner

File Edit View Favorites Tools Help

Back Search Favorites Media

Address https://fortress.wa.gov/oic/shibatraining/Secure/Search/ResourceSearch.aspx

HelpLine Office of the Insurance Commissioner

Resource Search

Advanced Search

Record #: [ ] Go

Location - State: Washington

Location - County: All

Organization: Office of the Insurance Commissioner

Entered By: All

Date Entered: [ ] to [ ]

Status: All

Last Name: [ ]

First Name: [ ]

Volunteer / Partner Type (check primary roles)

DIRECT SERVICE

- ☐ Counselor
- ☐ Outreach
- ☐ Public Speaker
- ☐ Administrative Support

COORDINATORS / MANAGERS

- ☐ Contract Manager
- ☐ Program Manager
- ☐ Volunteer Coordinator
- ☐ Sponsor Staff
- ☐ Community Partner Staff
- ☐ SHIBA / OIC Staff
- ☐ Other

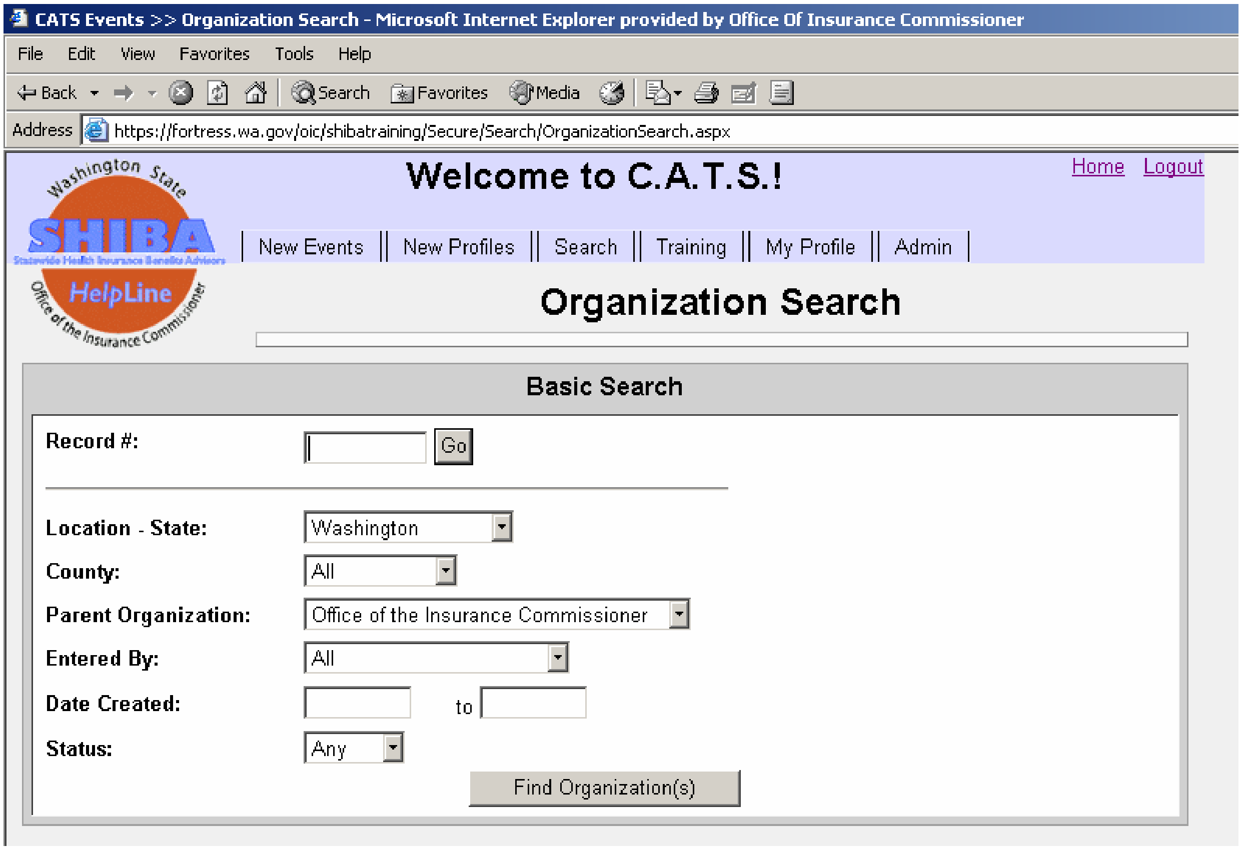
Hide Advanced

Find Resource(s)

SEARCH CRITERIA
Resource

Basic	
Record #	The record number, e.g. RES000007.
Location	The State and/or County based on the Assigned County field
Organization	Customarily, the name of the Sponsor.
Date Entered	The date the record was created in the system. Use this format: mm/dd/yyyy.
Status	Active, Inactive, Leave of Absence
Last Name	Last name of the resource (e.g. volunteer)
First Name	First name of the resource (e.g. volunteer)
Volunteer / Partner Type	The role of the resource (e.g. volunteer) in the program

Note: you can use either a starting or ending date for date range searches – you need not use both.


CATS Events >> Organization Search - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://fortress.wa.gov/oic/shibatraining/Secure/Search/OrganizationSearch.aspx
Washington State SHIBA HelpLine Office of the Insurance Commissioner
Welcome to C.A.T.S.!
Home Logout
New Events | New Profiles | Search | Training | My Profile | Admin
Organization Search
Basic Search
Record #: Go
Location - State: Washington
County: All
Parent Organization: Office of the Insurance Commissioner
Entered By: All
Date Created: to
Status: Any
Find Organization(s)

SEARCH CRITERIA
Organization

Basic	
Record #	The record number, e.g. ORG0000019.
Location	The State and/or County based on the Organization profile record.
Parent Organization	Customarily, the Office of the Insurance Commissioner, for Sponsors, or the name of the Sponsor, for Program Offices or Partners.
Entered By	The SHIBA ID for the person who created the record in the system. Note: all Sponsor records are entered by OIC staff.
Date Created	The date the record was entered into the system. Use this format: mm/dd/yyyy.
Status	Active, Inactive, Any

INDEPENDENT PRACTICE 6.0
Search

□ Use Search to find /open an existing record by the record ID#

□ Use Search to find existing records that match certain selection criteria

Skills and Knowledge Objectives for
Section 7: Public & Media Activity Report

Public & Media Activity Report

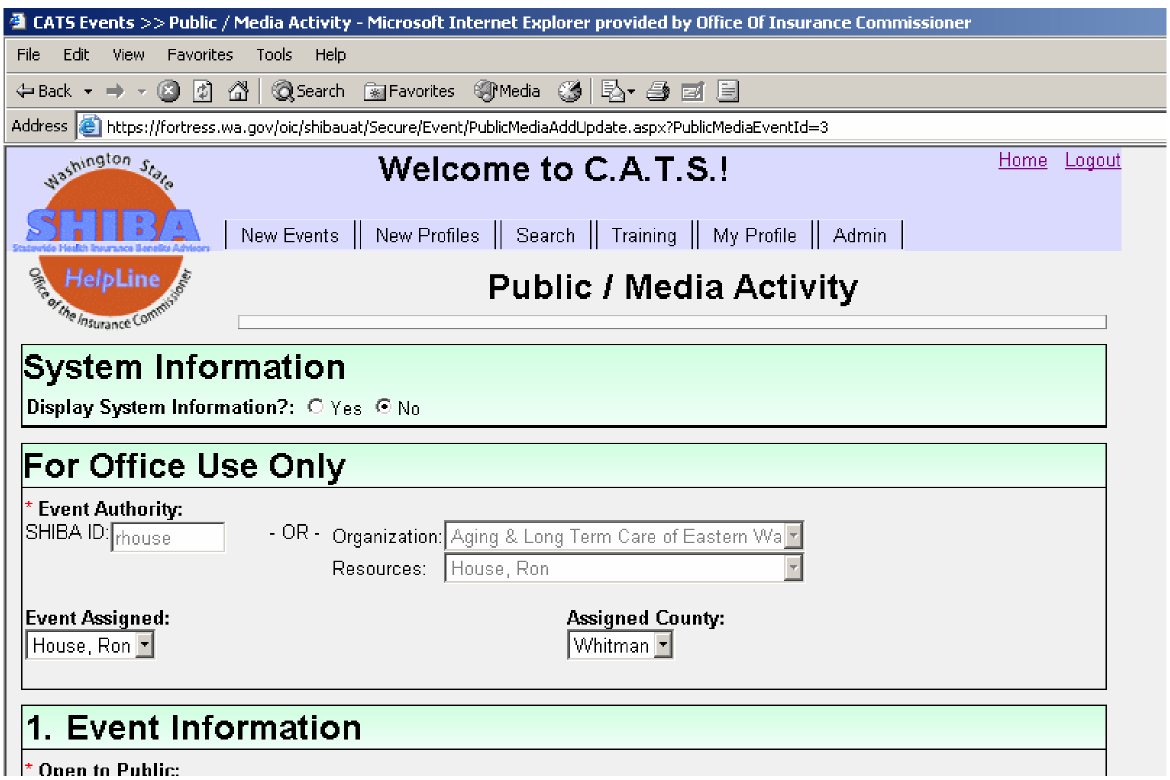
- Open an existing Public & Media Activity (PMA) record, from the queue
- Complete an incomplete Public & Media Activity (PMA)record
- Identify the fields that must be completed to save a record
- Identify the fields that must be completed to code a record “complete”
- Describe the difference between complete and incomplete for Public & Media Activity (PMA) records
- Record a new Public & Media Activity (PMA) event

GUIDED PRACTICE 7.0
Open a Public & Media Activity Form, from My Work Queue

From the user Home Page…
From My Work Queue (existing forms)…

- Click on the record ID # PMA0000**zz** to open that record

Click Home, to return to the Home Page.



Public & Media Activity Event Screens

Fields <u>required</u> to **save** an event record.

For Office Use Only
- Event Authority

Section1 – Event Information
- Open to Public
- Event Name
- Start Date / Time
- Street Address
- City
- Zip
- County
- State

Section 2 – Event Host Information
- Organization Name
- Last Name
- First Name
- State

Section 3 – Activity
- Check <u>one</u> from either list – you <u>can't</u> pick one from each

Section 5 – Topic Focus
- Check at least one

Section 6 – Target Audience
- Check at least one

Section 7 – Presenter Information
- Check at least one

Fields <u>required</u> to code a record as '**complete.'**

- Est. # of Participants.
- Actual # of Participants.
- Est. # Enrolled.
- End Time of Activity.

GUIDED PRACTICE 7.1
Complete an incomplete Public & Media Activity (PMA) Form

From the user Home Page…
From My Work Queue (existing forms)…

Note: the Status for record ID # PMA0000**zz** is "Incomplete"

- Click on the record ID # PMA0000**zz** to open that PMA
- Click <Save>
- Read the error messages at the top of the screen
- Complete the required fields – using the information provided below
- Click <Save>

Click Home, to return to the Home Page.

Note: the Status for the record ID # PMA0000**zz** is now "Complete"

Use this data to complete the form:

Est. # of Participants	25
Actual # of Participants	25
Est. # Enrolled (in program)	5
End Time of Activity (End Date)	03/06/2006

INDEPENDENT PRACTICE 7.2
Record a Public & Media Activity (PMA) Record

(1)Using the sample forms provided in the participant notebook, plus the notes you have, record a PMA.

(2) After you complete the data entry, refer back to the Home Page, My Work Queue, to see the results.

<u>Suggestion</u>: Write the record ID# from the system on the paper form.

Q. What possible challenges do you foresee with data entry in your own agency?

Q. How might you address those?

Skills and Knowledge Objectives for Section 8: Resource Record

Resource Record

- Open an existing Resource Record, using the Search function
- Edit an existing Resource Record
- Understand the assignment process for a SHIBA ID
- Save a Resource Record
- Print a Resource Record
- Identify the fields required to save a Resource Record
- Describe the correct completion of the fields in Section 5
- Record a new Resource Record
- Open an existing Organization Record, using the Search function
- Assign a Resource to a Coverage Area Team
- Print an Organization Profile
- Create a User Account
- Describe the implications of creating a user account for a Resource
- Describe the protocol for assigning a security level to a user account

GUIDED PRACTICE 8.0

8.0 Open an Existing Resource Profile
8.1 Edit an Existing Resource Profile
8.2 Print an Existing Resource Profile

From the Home Page…

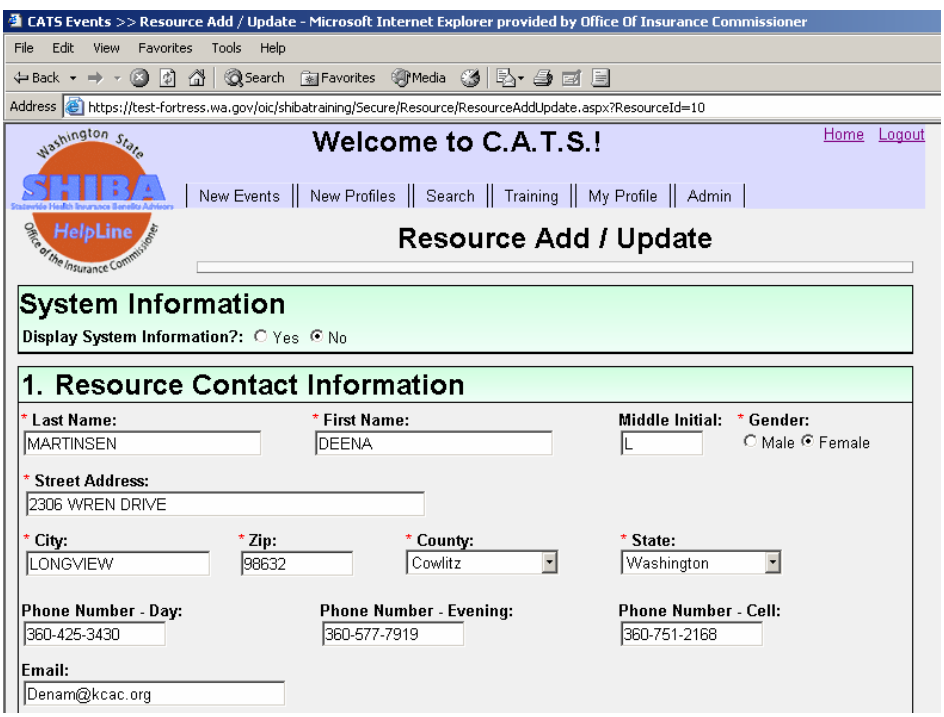
- Point at "Search" and click on Resources.

Use the Search function to open / find the Resource

The Resource Add /Update screen appears.

Make edits as required.

- Click <Save>
- Click <Print> to generate a PDF copy.



PARTICIPANT NOTES
Resource Record Screen

Fields required to **save** an event record.

- Last name
- First name
- Gender
- Address
- City
- Zip code
- County
- Phone number – day
- Date of birth
- Disabled
- Race/Ethnicity
- Funding
- Volunteer / Partner Type

Of course, we'd like all the fields to be completed by the volunteers, but these are essential.

PARTICIPANT NOTES
RESOURCE RECORD SECTION 5

SHIBA ID

You have two options.

1. You can create one.
2. The system will automatically assign a SHIBA ID [first initial, plus first five of last name].

Coverage Areas

Note: although this appears on the Resource Record form, it is actually assigned in a second step when we are working in the database.

Volunteer / Partner Status

The system default is to active with today's date.
The correct format is: mm/dd/yyyyy.

Funding

Paid (by SHIBA) --SHIBA Staff, OIC staff (not technically paid by SHIBA but close enough), Sponsors who get funding from us that covers their staff salaries (i.e. King County, Whatcom County) If you're not sure, Jeanne has the contracts with the budgets attached.

Volunteer (un-paid) --self explanatory--although believe it or not, we actually have at least one volunteer coordinator (Jack Wood) who is an unpaid volunteer.

In-Kind (paid by another organization) --most of our sponsor and partner staff fall into this category. They are paid by some other organization to do SHIBA work.

Volunteer / Partner Type

GUIDED PRACTICE 8.3
RECORD A RESOURCE PROFILE

From the user Home Page…

- Point at New Profiles and click on Resource.

The Resource Add/Update screen appears. [next page]

- Scroll down to the bottom of the screen
- Click on <Save>.

The message at the top of the screen lists fields that are required. A complete list of required fields for the Resource Record appears on page **zz** in your manual.

Using the resource form you have on page **zz**…:

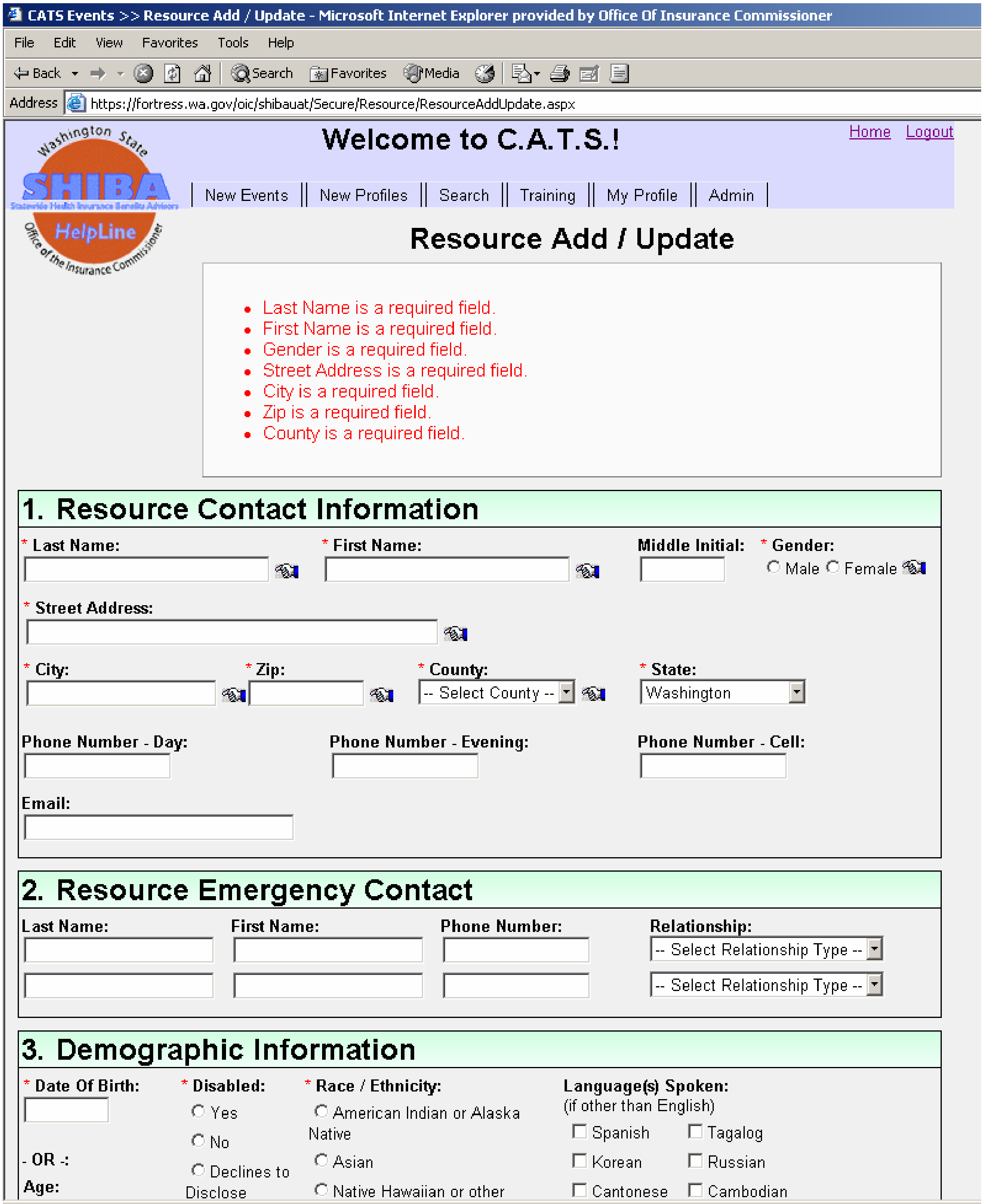
- Complete the required fields in Section 1, Section 3, and Section 4.
- Scroll down to the bottom of the screen and click on <Save>.

More detailed information is required in Section 5. See page **zz** in your manual for assistance. Note: for Volunteer/Partner Status, it automatically applies active and today's date as the start date.

Using the resource form you have on page **zz**…:

- Complete Section 5.
- Click <Save>.
- Click <Print> to create a PDF copy of the record for your files.

[See page **zz** in your notebook for a sample.]


CATS Events >> Resource Add / Update - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://fortress.wa.gov/oic/shibauat/Secure/Resource/ResourceAddUpdate.aspx
Washington State SHIBA HelpLine Office of the Insurance Commissioner
Welcome to C.A.T.S.!
Home Logout
New Events | New Profiles | Search | Training | My Profile | Admin
Resource Add / Update
Last Name is a required field.
First Name is a required field.
Gender is a required field.
Street Address is a required field.
City is a required field.
Zip is a required field.
County is a required field.
1. Resource Contact Information
* Last Name:
* First Name:
Middle Initial:
* Gender:
Male Female
* Street Address:
* City:
* Zip:
* County:
-- Select County --
* State:
Washington
Phone Number - Day:
Phone Number - Evening:
Phone Number - Cell:
Email:
2. Resource Emergency Contact
Last Name:
First Name:
Phone Number:
Relationship:
-- Select Relationship Type --
-- Select Relationship Type --
3. Demographic Information
* Date Of Birth:
- OR -:
Age:
* Disabled:
Yes
No
Declines to Disclose
* Race / Ethnicity:
American Indian or Alaska Native
Asian
Native Hawaiian or other
Language(s) Spoken:
(if other than English)
Spanish
Tagalog
Korean
Russian
Cantonese
Cambodian

INDEPENDENT PRACTICE 8.3
Record a Resource Profile

□ Complete a blank (paper) Resource Record.

□ Trade forms with a colleague sitting nearby.

□ Enter the Resource Record your colleague created into the system.

□ Write down what you noticed as possible challenges – note: the screens do not match the forms.

GUIDED PRACTICE 8.4
Assign a Resource to a Coverage Area Team

From the Home Page…

- Point at Search and click on Organizations.

The Organization Search screen appears.

- Click the Search criteria for Parent Organization to ALL
- Click on <Find Organizations>.

The Search Results screen appears.

- Click on the ID# for the organization of interest.
- [ID# **zz – ZZ Sponsor**]

The Organization Add/Update screen appears.

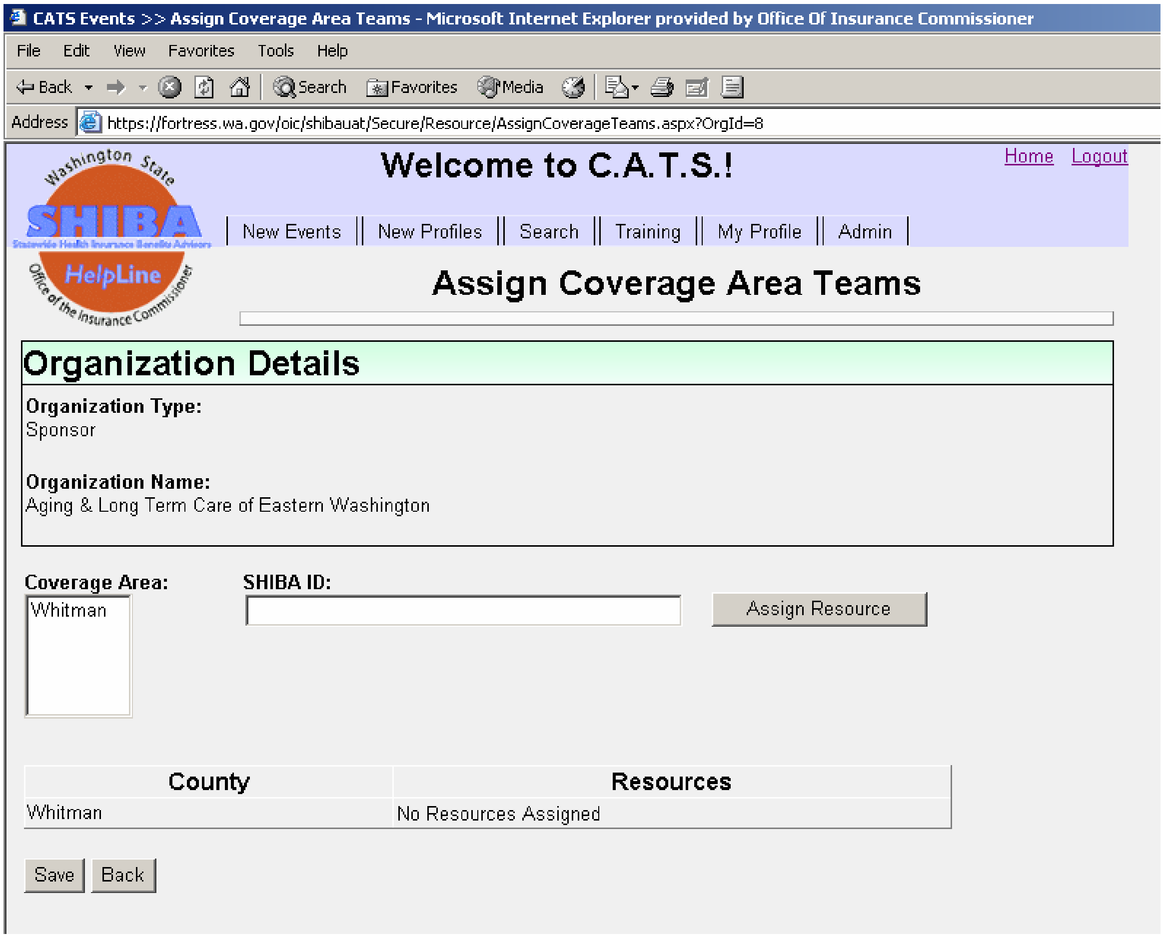
Scroll down to the bottom…

- Click on <Assign Coverage Area Teams>

The Assign Coverage Area Teams screen appears. [next page]

It takes five (5) steps to assign a resource to a coverage area team:

1. From the coverage area list on the left, highlight or select the county or counties for the resource (i.e. volunteer or staff person),
2. In the SHIBA ID field, type in the SHIBA ID for each resource (separate them with a space, if there are several)
3. Click on <Assign Resource>
4. Click on <Save>
5. Click <Back> to return to the organization record; click <Save>



You can now see the names of the counties, in alphabetical order, along with the resources assigned to that county.

From the Organization Profile screen…

- Click <Print>

To view the assignments of resources.

INDEPENDENT PRACTICE 8.4
ASSIGN A RESOURCE TO A COVERAGE AREA TEAM

(1) Assign a resource to a coverage area team. You can choose the resources and organizations and counties.

(2) Test some common errors

□ In Step 1, do not highlight a county from the field list, add the resource ID, click <Assign Resource>
forgot to: ______________________________

□ In Step 2, highlight a county from the field list, add an invalid resource ID, click <Assign Resource>
forgot to: ______________________________

□ In Step 3, highlight a county from the field list, add a valid resource ID, click <Save>
forgot to: ______________________________

□ In Step 4, highlight a county from the field list, add a valid resource ID, click <Assign Resource>, click <Back>, click <Assign Coverage Area Teams>
forgot to: ______________________________

GUIDED PRACTICE 8.5
Create a User Account

From a saved resource, that has an <u>unique</u>, valid e-mail address…

- Click on <Create User Account>

The Create Security Account screen appears. [next page]

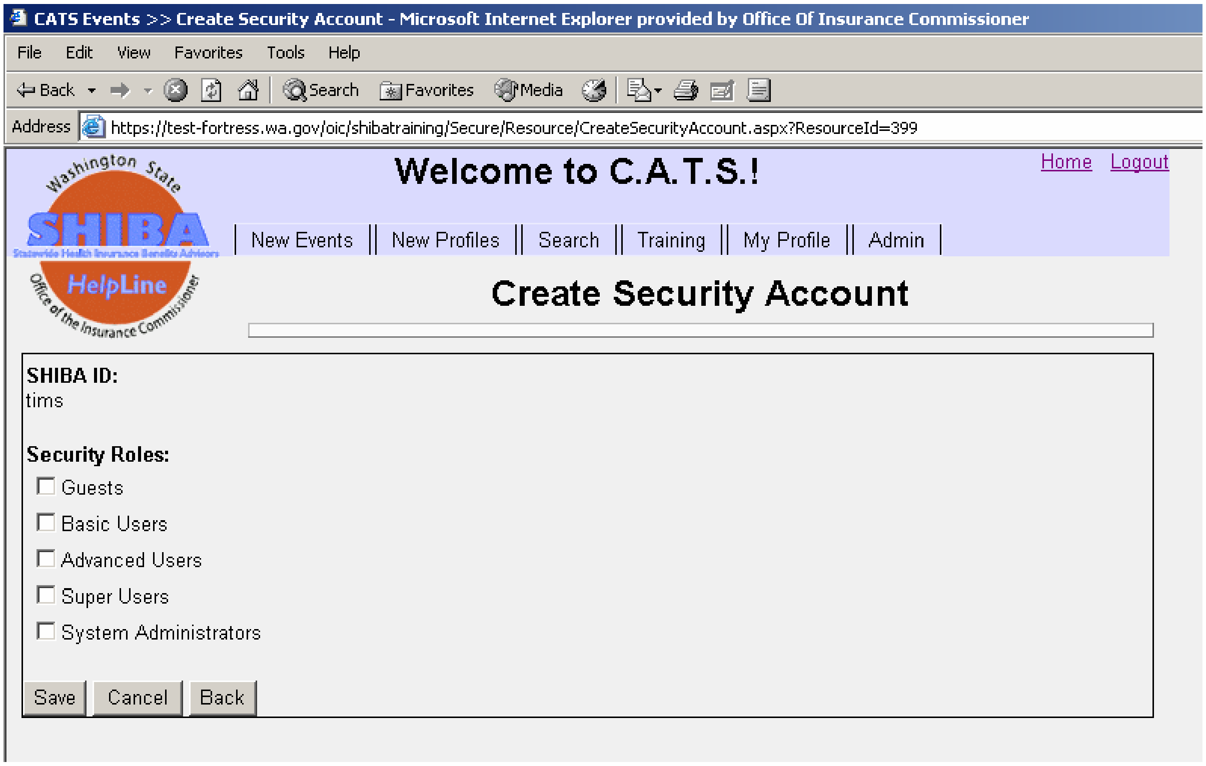
Note: the levels of security that you can assign relate to your own level of security. You can assign levels lower than your own, but not higher than your own.

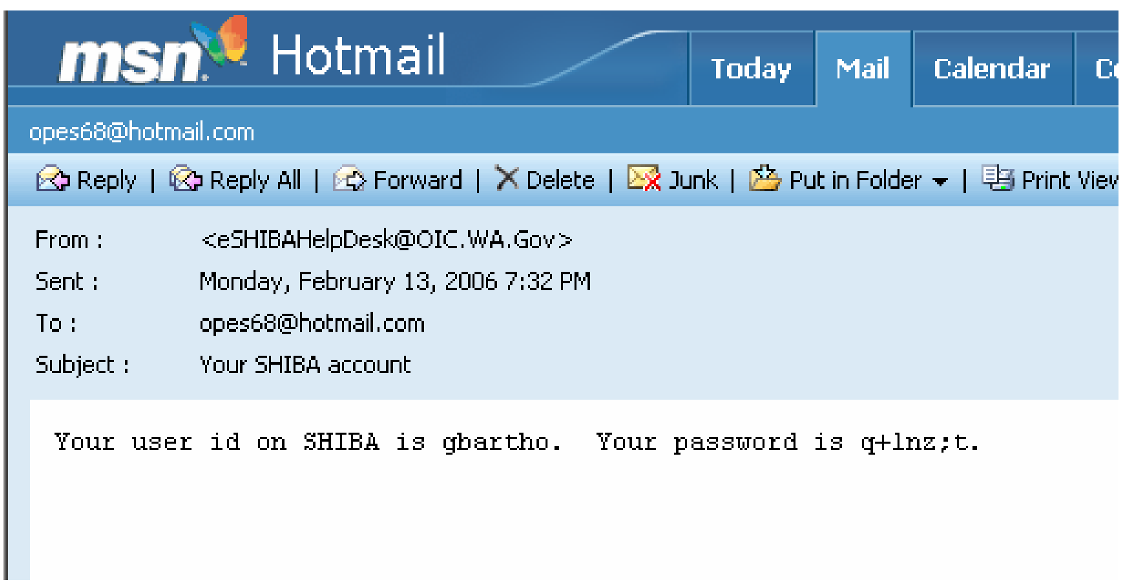
- Click to check "Basic Users." (This is the level that you would assign most volunteers).

- Click on <Save>.

Note: the system automatically generates an e-mail message to the new user. [next page]

This is a temporary password. The new user will be asked to change this password when they login for the first time.


CATS Events >> Create Security Account - Microsoft Internet Explorer provided by Office Of Insurance Commissioner
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://test-fortress.wa.gov/oic/shibatraining/Secure/Resource/CreateSecurityAccount.aspx?ResourceId=399
Welcome to C.A.T.S.!
Home Logout
New Events | New Profiles | Search | Training | My Profile | Admin
Create Security Account
SHIBA ID:
tims
Security Roles:
Guests
Basic Users
Advanced Users
Super Users
System Administrators
Save Cancel Back


msn Hotmail
Today Mail Calendar
opes68@hotmail.com
Reply | Reply All | Forward | Delete | Junk | Put in Folder | Print View
From : <eSHIBAHelpDesk@OIC.WA.Gov>
Sent : Monday, February 13, 2006 7:32 PM
To : opes68@hotmail.com
Subject : Your SHIBA account
Your user id on SHIBA is gbartho. Your password is q+lnz;t.